

# Practice EHR Patient Portal User Guide

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## Introduction

Practice EHR Patient Portal is a web-based health care patient portal that provides the perfect way for providers and patients to connect, share information and engage in health care follow-ups.

### Overview of some basic features:

- Schedule appointments
- Send Lab/Medication related messages
- View, download and transmit health records
- View user activity log

**Note:** Practice EHR customizes the login page and the logo of patient portal, according to the practices.

## About This Guide

This User Guide explains how to use the features and functions of the Practice EHR Patient Portal. This guide is limited to the basic patient portal functionality and it cannot cover all real life situations which are out of the scope of this guide

## Portal Account Creation through Practice EHR

To create patient portal account for the selected patient follow the steps below:

- Step 1. Add **EMAIL** in patient demographic in Practice EHR.
- Step 2. Mouse hover on action menu and Click on **Activate Patient Portal**.

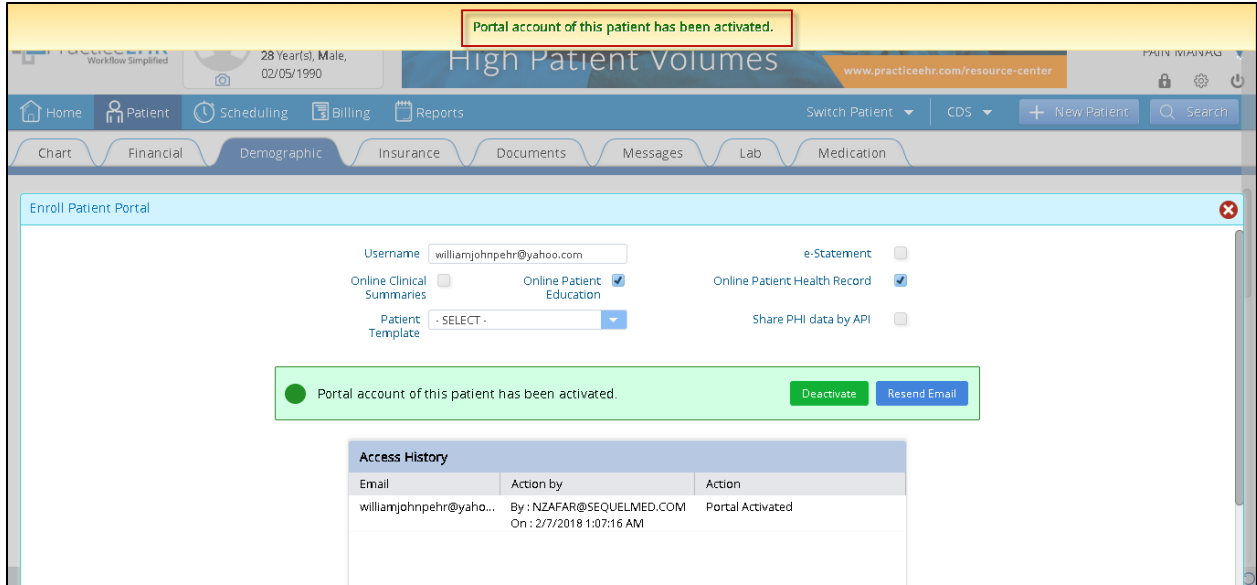
The screenshot shows the 'Patient Demographic' form. The 'Email' field is populated with 'williamjohnpehr@yahoo.com'. A dropdown menu is open on the right, showing options: Letter, Print Demographics, History, **Activate Patient Portal** (highlighted in red), Immunization Registry Info, and Scan Drivers License.

- Step 3. Enroll Patient Portal window will open click on Activate to create portal account.

The screenshot shows the 'Enroll Patient Portal' window. The 'Username' field is populated with 'williamjohnpehr@yahoo.com'. The 'Activate' button is highlighted in red. Below the form is an 'Access History' table with columns: Email, Action by, and Action.

Email	Action by	Action
No Data Found		

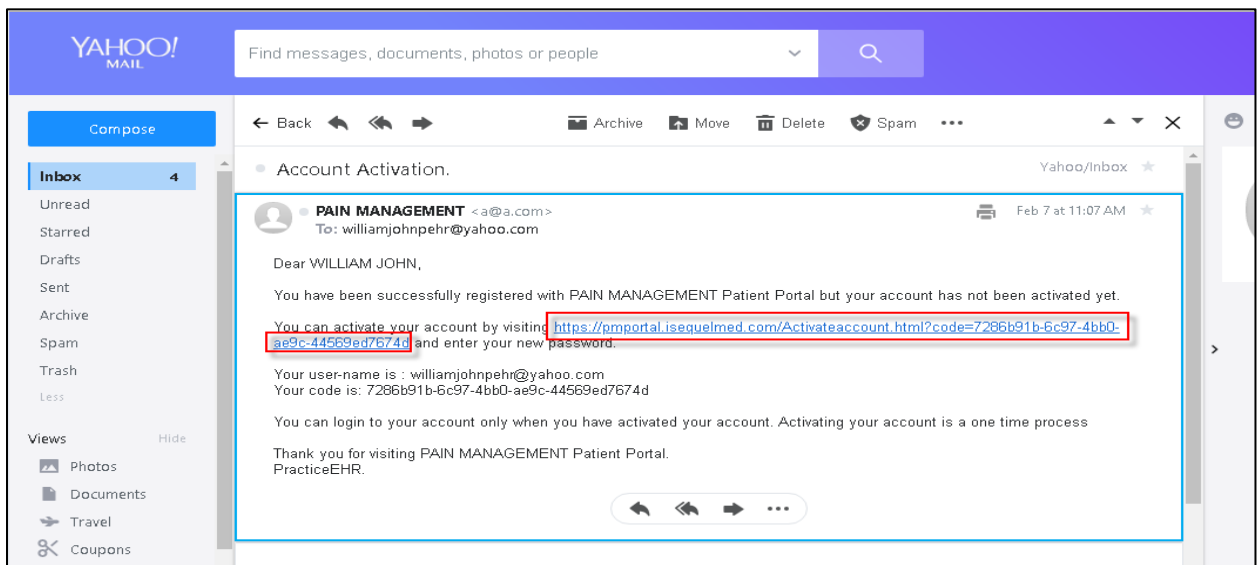
The system will then show an acknowledgment message about sending of an account activation email to the patient. (See image below)



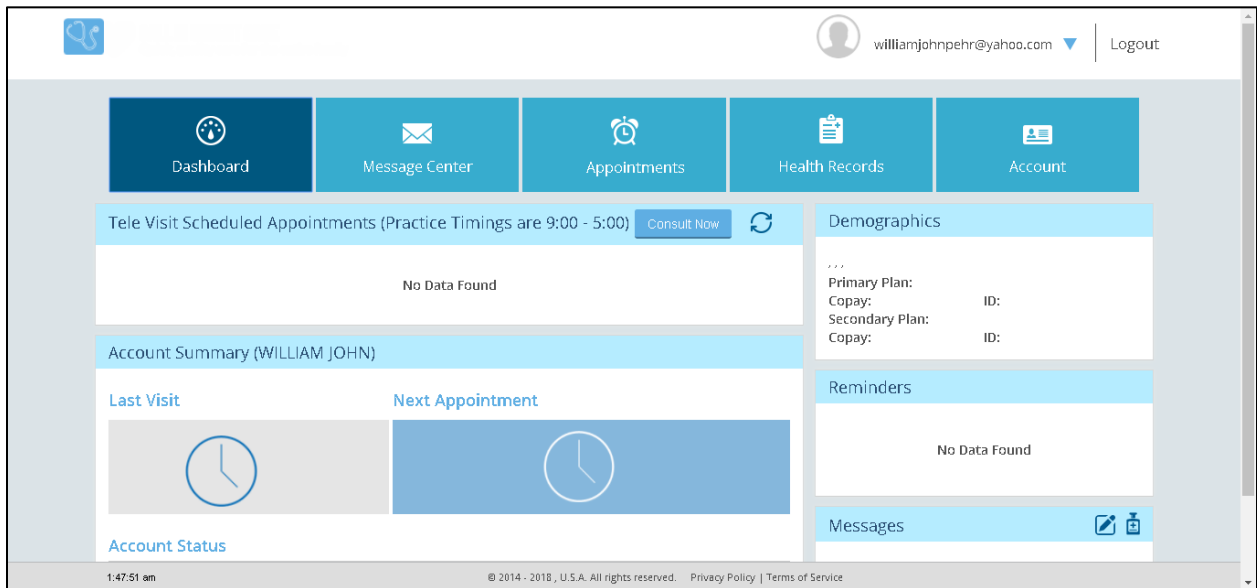
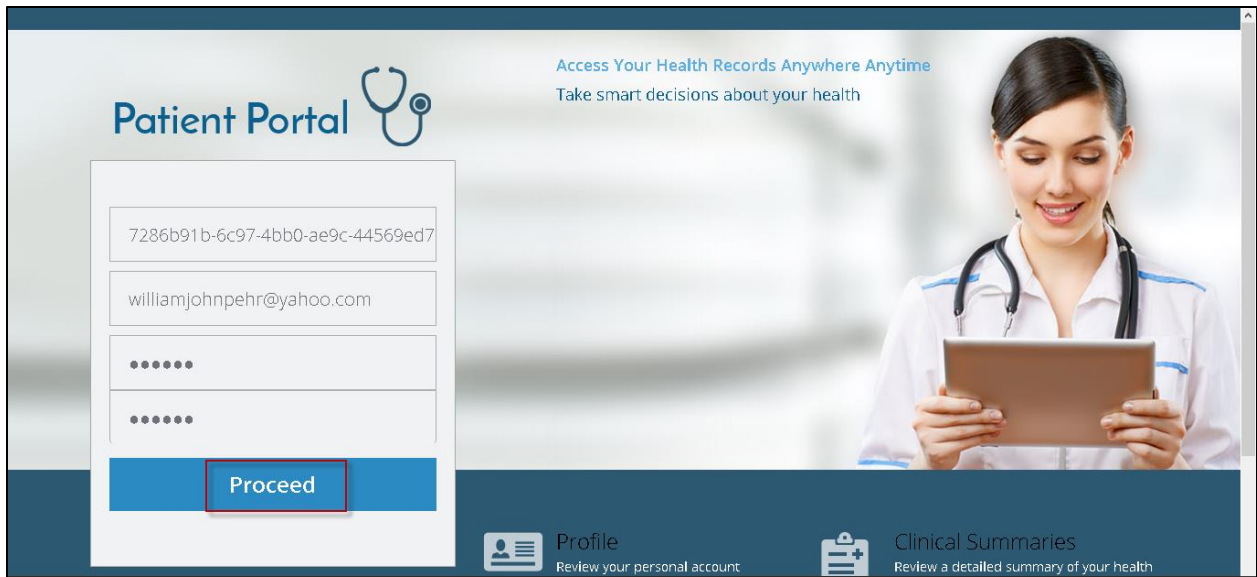
Step 4. On the Enroll Patient Portal Account window, please select the appropriate check boxes to set portal feature for the patient.



Step 5. Patient will login with email account provided in demographics then open activation email and click on activation link.



Step 6. Patient Portal activation form will open then enter password in your account password and confirm password field then click on **Proceed** button. Account will be activated and logged in as well.



## Assigning Patient Intake Template

Practice EHR users may assign intake template to a patient which can then be filled in by the patients at their own convenience.

In Enroll Patient portal account window, select template form Patient template dropdown.

Step 1. Click **Update** to send it to the patient's portal account.

The screenshot shows the 'Enroll Patient Portal' interface. The 'Patient Template' dropdown menu is set to 'INTAKE'. The 'Update' button is highlighted with a red box. Below the form, a green notification bar states 'Portal account of this patient has been activated.' with 'Deactivate' and 'Resend Email' buttons. An 'Access History' table is visible at the bottom.

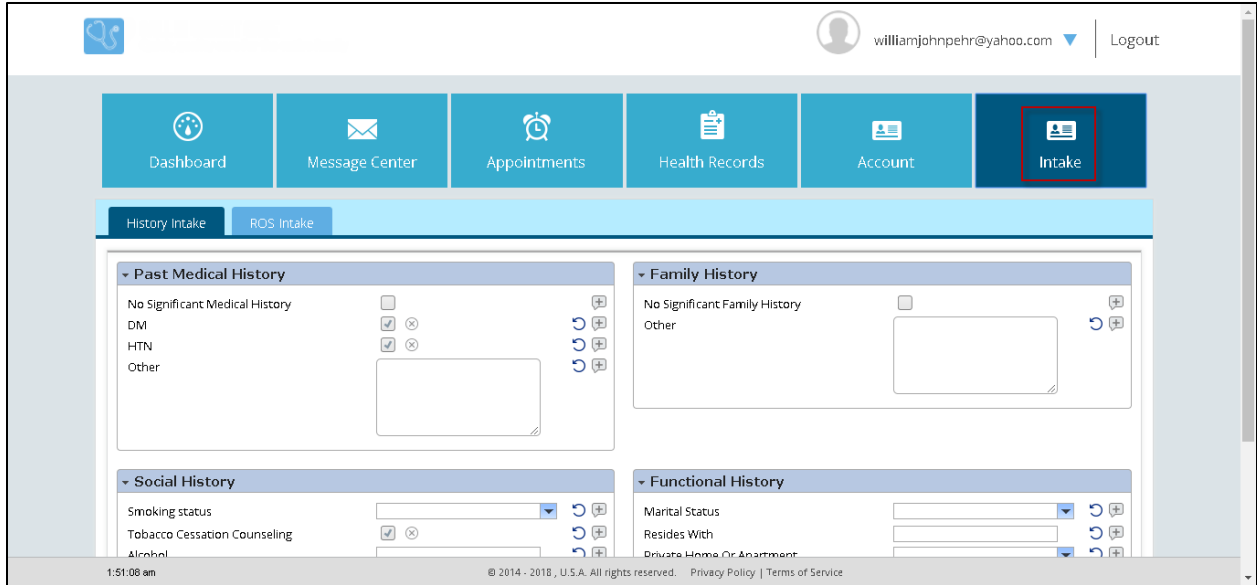
Email	Action by	Action
williamjohnpehr@yaho...	By : NZAFAR@SEQUELMED.COM On : 2/7/2018 1:49:09 AM	Template : INTAKE Selected

## Patient Intake Template in Patient Portal

In patient portal, Intake template appears on Navigation bar.

To fill in and submit the intake template in the portal:

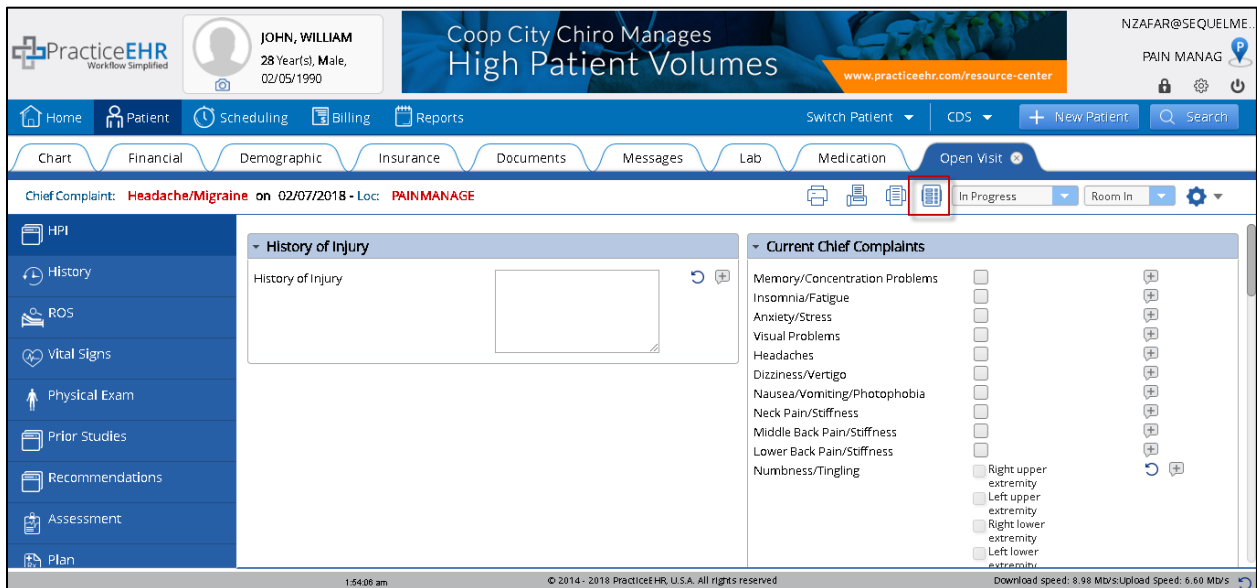
- Step 1. Click the **Intake** tab.
- Step 2. Fill in the **patient intake template**.



- Step 3. Switch intake sections to **save intake template**.
- The portal exports the intake form to Practice EHR.

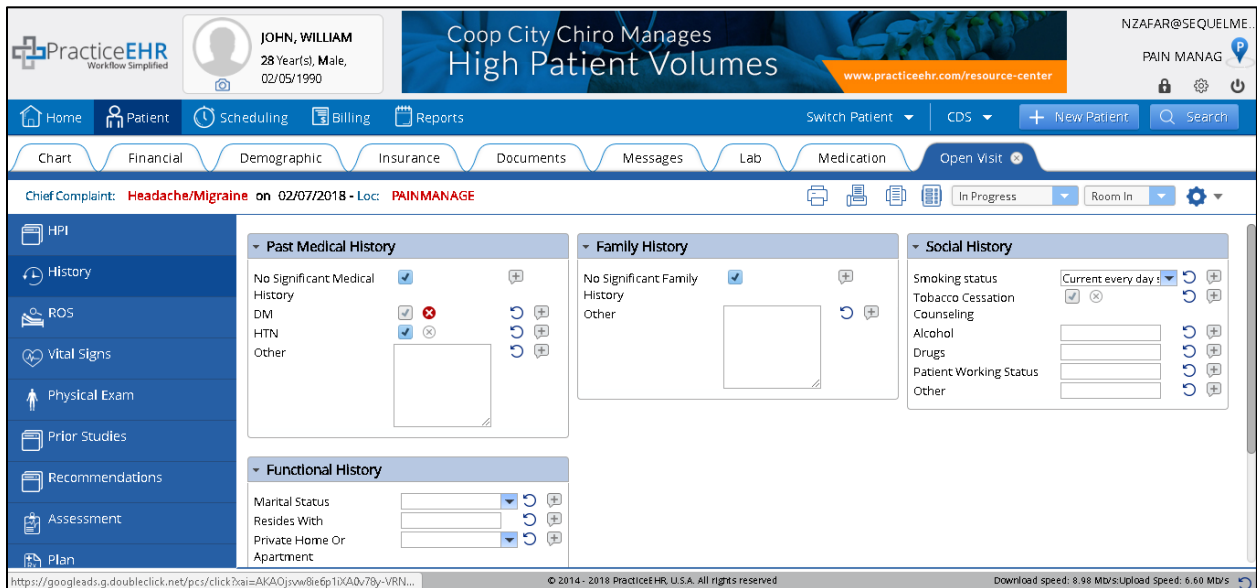
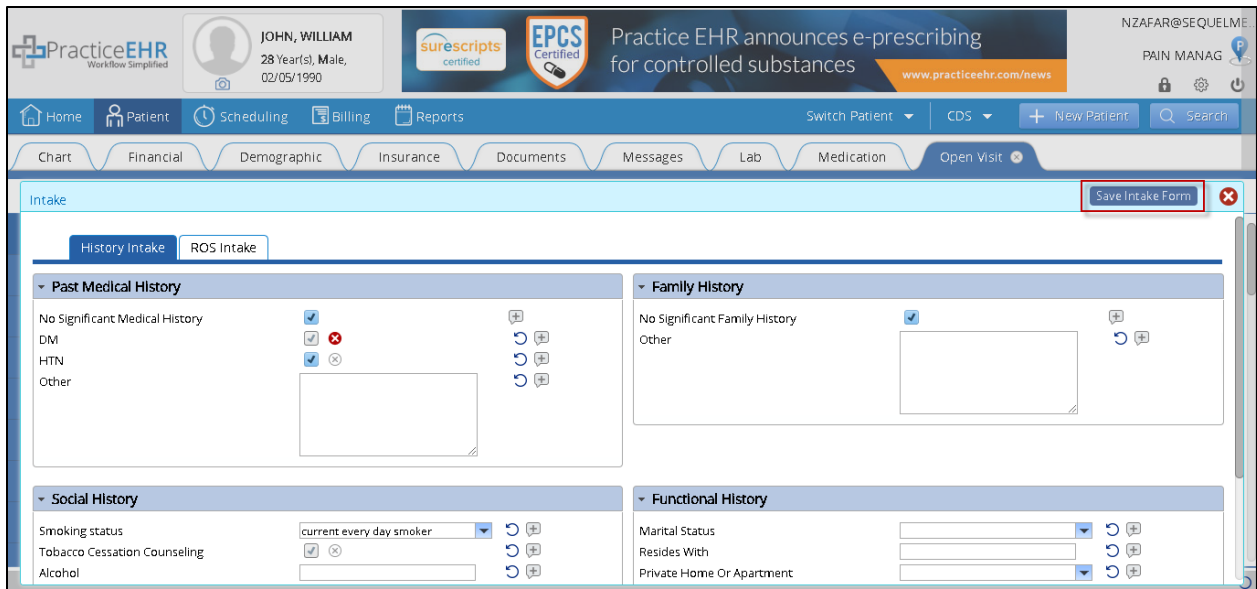
### **How to Import Intake Template in Practice EHR**

- Step 1. Create Clinical Visit in Practice EHR.
- Step 2. Once the Visit is created for the same patient then **"Intake"** icon will be available, as shown in the image below:



- Step 3. Click **"Intake"** icon and system will open intake window.

Step 4. Click on **“Save intake form”** button on the intake window and system will populate the section filled in by the patient in patient portal as shown in the image below:



## The Patient Portal Home Page

Practice EHR users can create Patient Portal accounts for patients and upon doing so the system sends an email to patients or patient representative, containing the activation URL.

### To access the home page of the Patient Portal:

- Step 1. Open web browser
- Step 2. Navigate to the patient portal URL.

The portal home page will open in the browser as shown in the image below.



This is the login page for the Practice EHR Patient Portal.

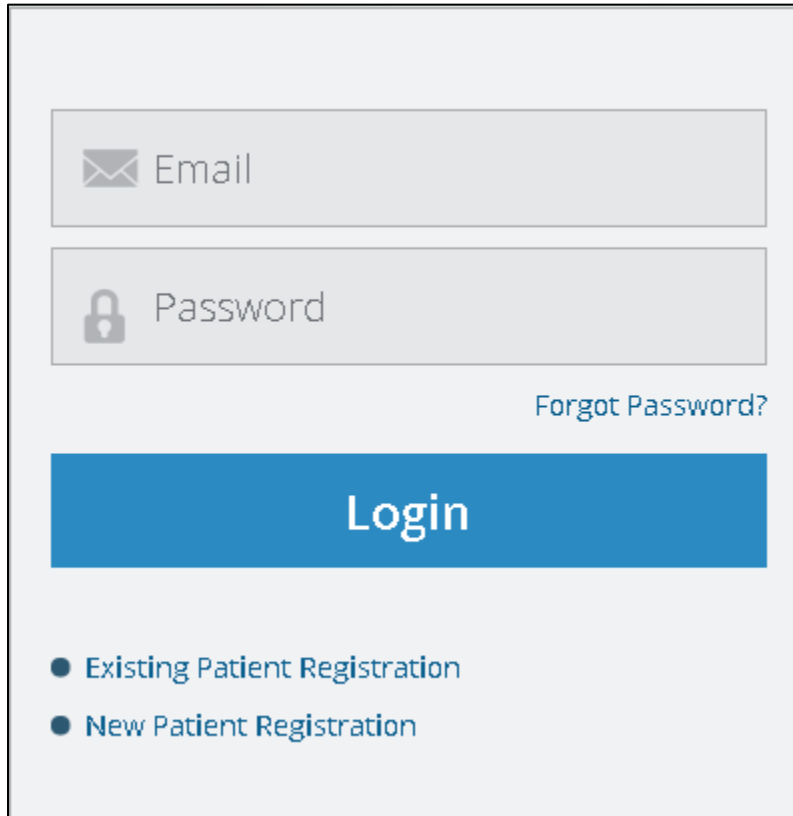
Based on the activation email received, patients will login using their username and password. The login page contains URLs for different functions as well, i.e.

- [Forgot your password?](#)
- [Existing Patient Registration Form](#)
- [New Patient Registration Form](#)

### **Log In**

- Step 1. Enter the Email address

- Step 2. Enter Password (Setup earlier via the portal activation link)
- Step 3. Click on Login button.



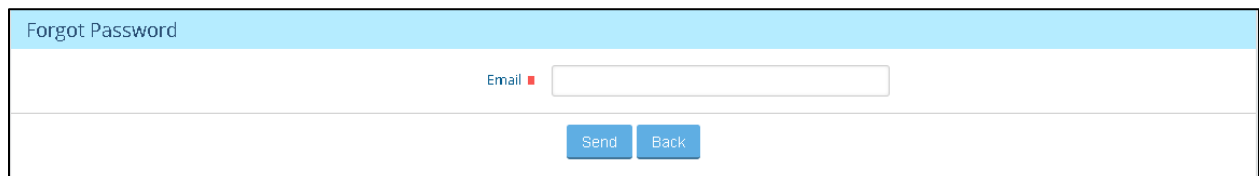
The screenshot shows a login interface with the following elements:

- An input field for "Email" with an envelope icon.
- An input field for "Password" with a lock icon.
- A link labeled "Forgot Password?" in blue text.
- A large blue button labeled "Login".
- Two radio button options: "Existing Patient Registration" and "New Patient Registration".

## **Forgot Your Password?**

In case patients forget their passwords, they can retrieve it by following these steps:

- Step 1. Click on the link for '**Forgot your password?**' on the login menu bar.
- Step 2. A new window will open.



The screenshot shows a "Forgot Password" window with the following elements:

- A light blue header bar with the text "Forgot Password".
- An input field for "Email" with a red error indicator.
- Two buttons: "Send" and "Back".

- Step 3. Enter **Email** (patient email address)
- Step 4. Click on **send** button.

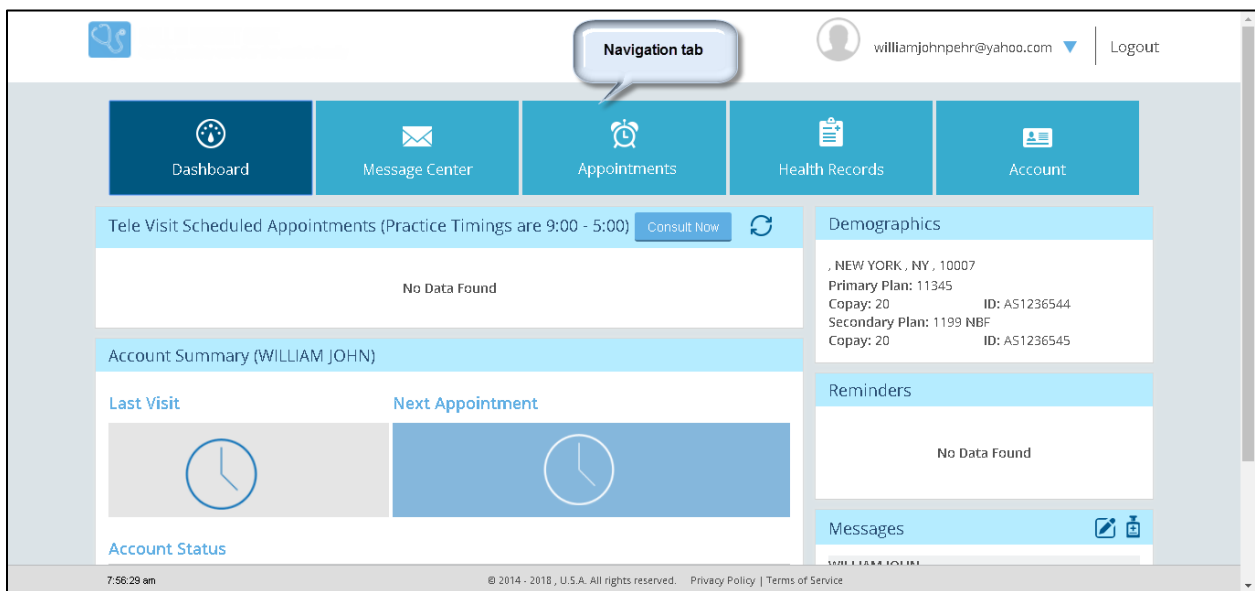
Password will be sent to the patient's email address.

## Patient Portal Interface

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After the successful login, users see the portal dashboard.

- Patient can click a **Navigation Tab** to access the information.



The information about the functions on Navigation Bar has been described in detail on the following pages.

## Message Center

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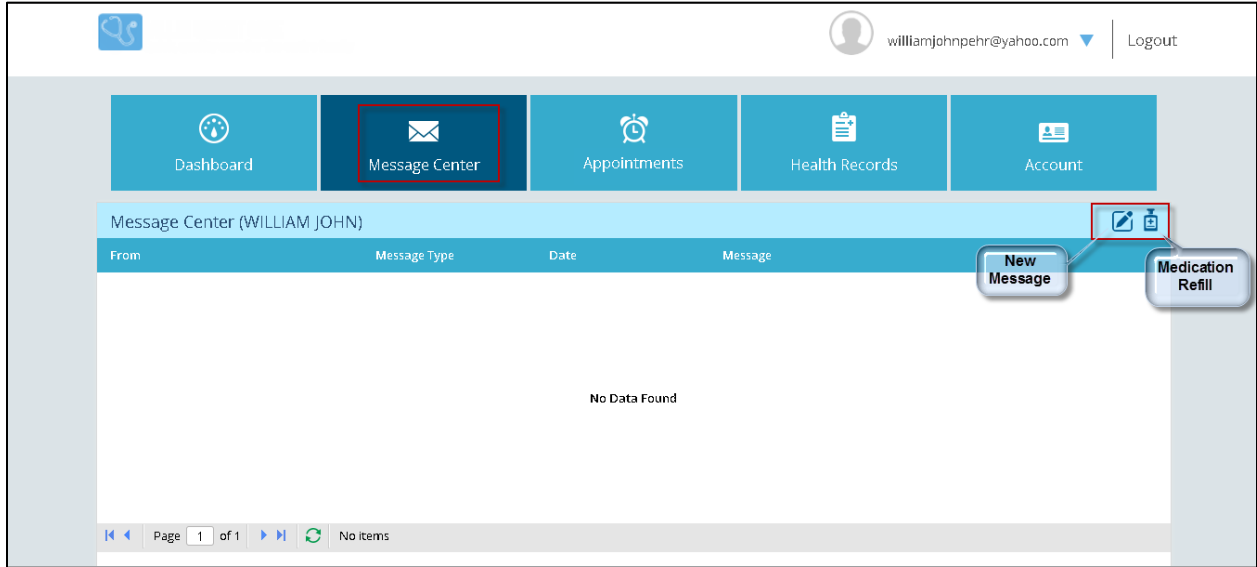
The Practice EHR Patient Portal provides a convenient way of communicating with practice.

### Create and Send Messages

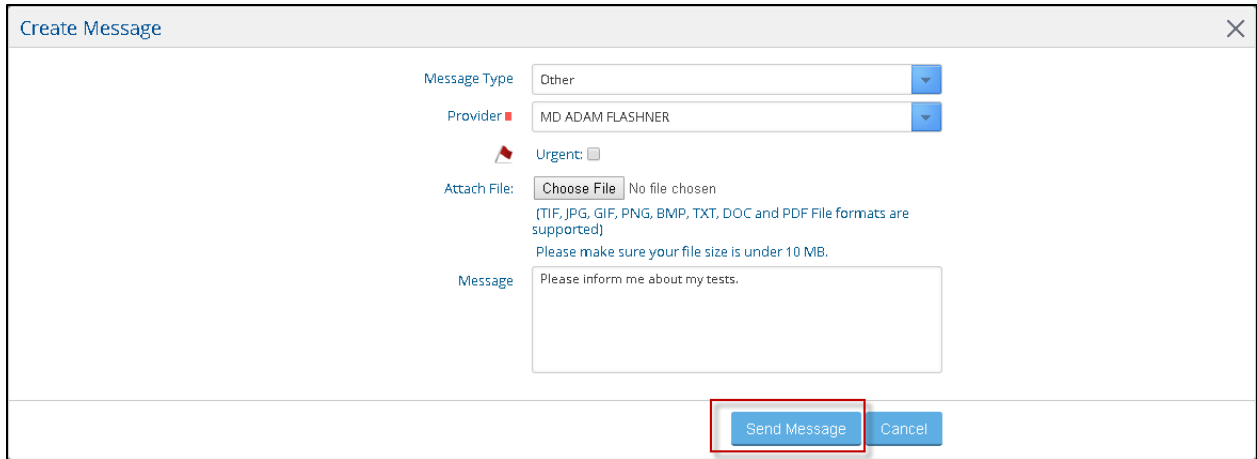
To create and send a new message:

- Step 1. Click on **Message Center** in the navigation bar.

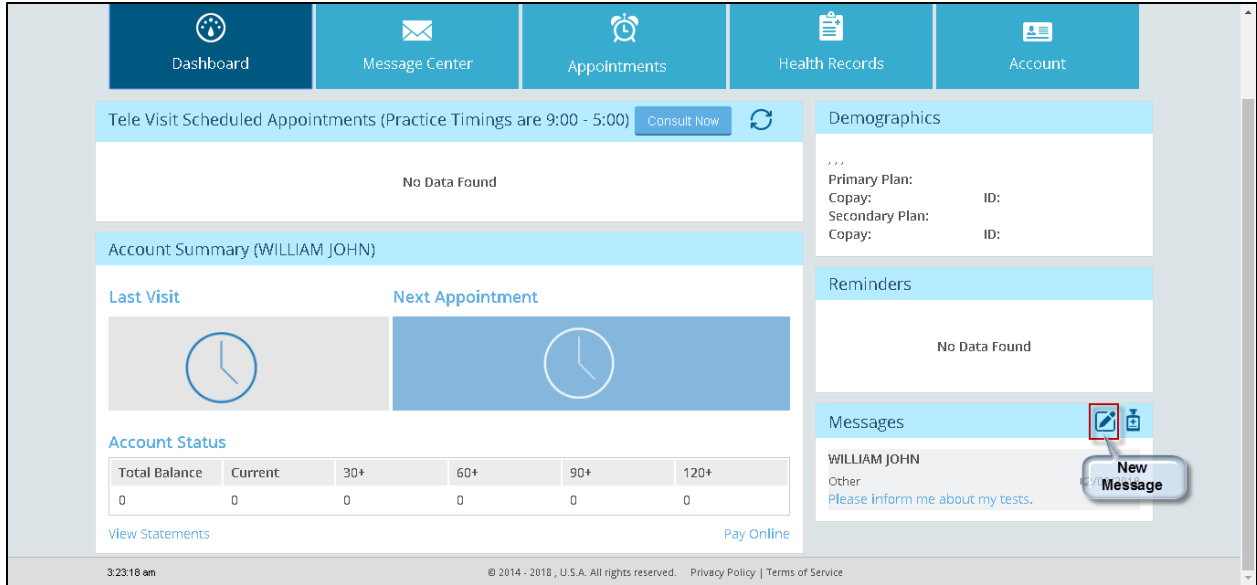
Step 2. **Message Center** window will open that contain two icons **New message** and **Medication refill**.



- Step 3. Click on **New message** icon. Pop up window will open.
- Step 4. Select **Message Type**.
- Step 5. Select the **Provider**, to whom user wants to send the message.
- Step 6. Type the message in the message field.
- Step 7. Click on **Send Message** button to proceed with sending the message.

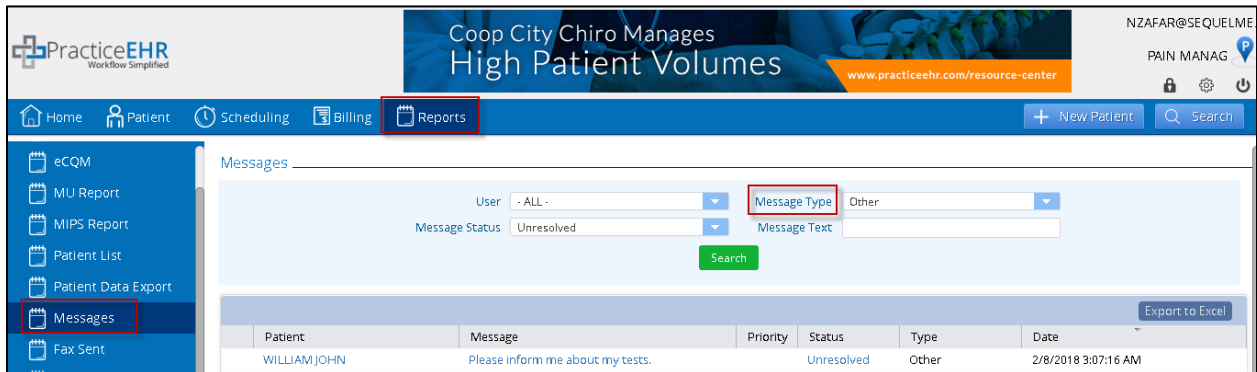


Patient can also create **New Message** from Dashboard as shown in image below:

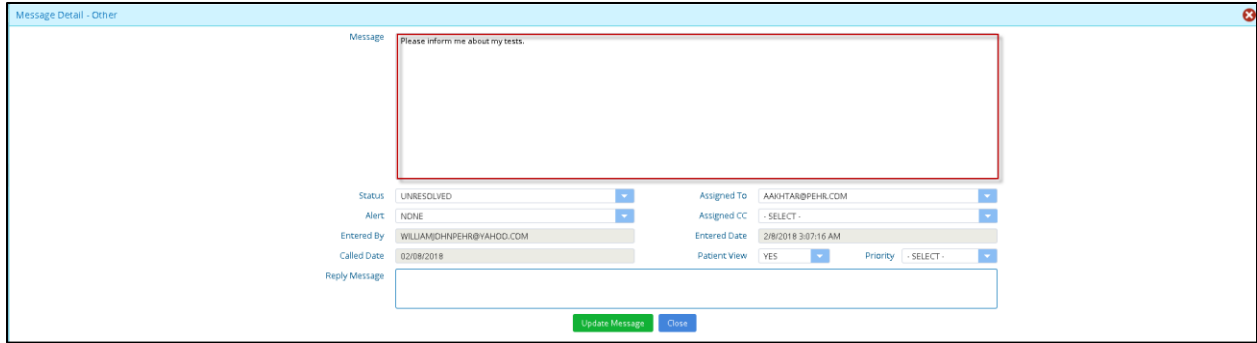


## Patient Message in Practice EHR

In Practice EHR messages which have been sent by the patient via patient portal will be available in Reports under “**Patient Messages**” as shown in the image below:



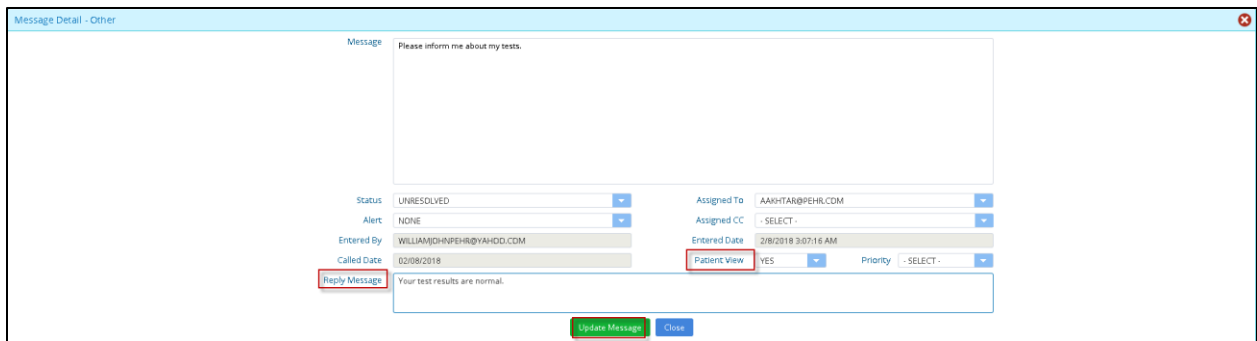
In Practice EHR user can see the message detail by click on message hyperlink as shown in the image below:



Practice EHR user can send a reply back to patient’s message by following the steps below,

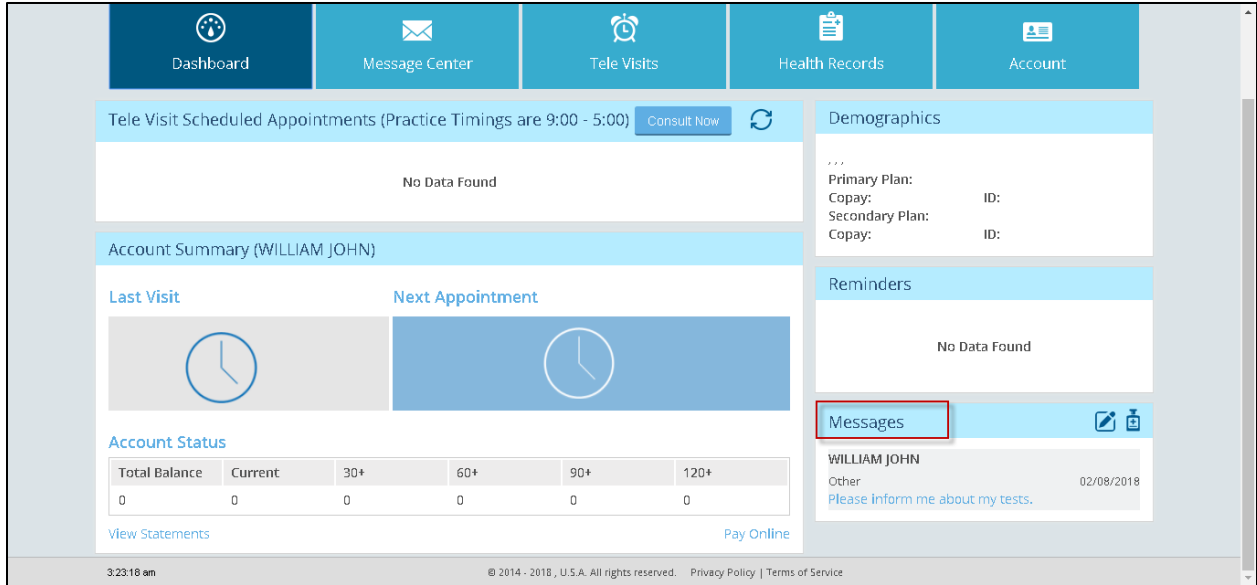
- Step 1. Click on “**Reply Message**”, field.
- Step 2. Type Reply for Patient in the message field.
- Step 3. Select Patient View ‘**YES**’ form drop down and then click on **Update Message** button.

Please see image below:

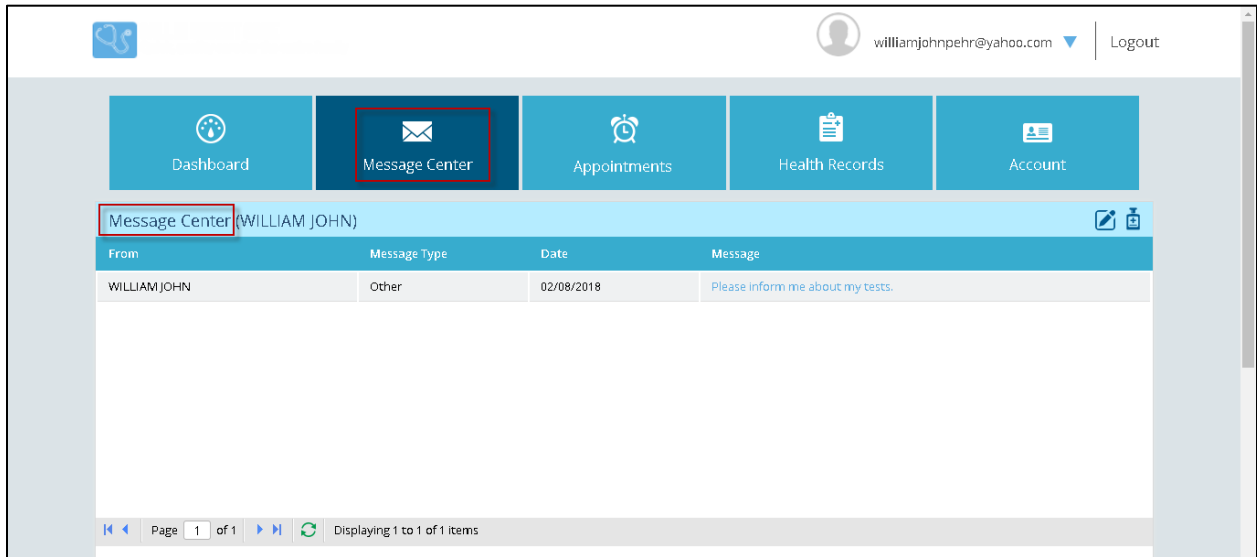


After Practice EHR user click on “**Update Message**” button, Message detail window will get closed and reply will be sent to patient. Patient can Log in to their patient portal account and follow the steps below:

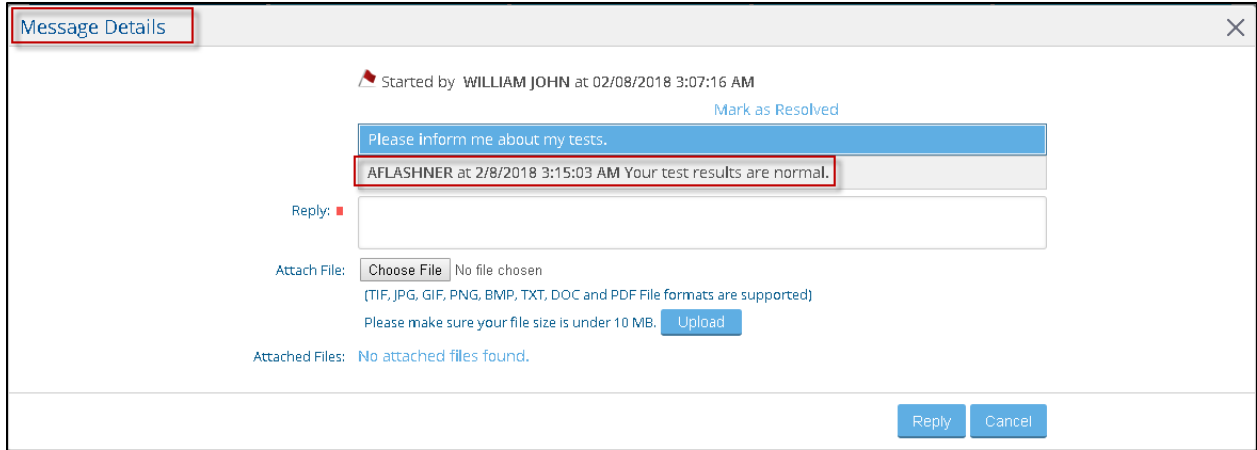
- Step 1. Go to Dashboard.
- Step 2. Messages grid contain message, as shown in the image below:



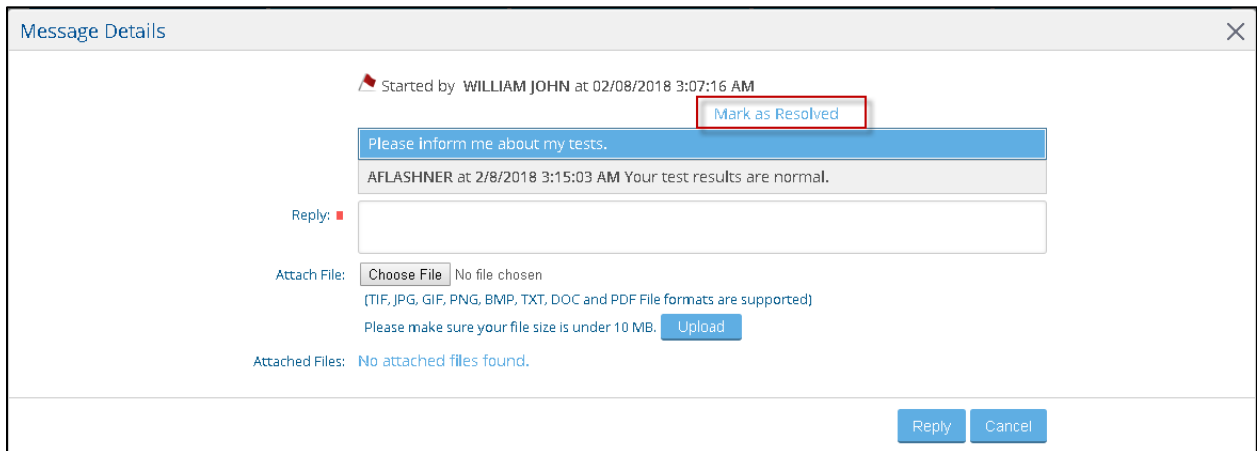
Step 3. Patient can also access messages from Message Center tab, as shown in the image below:



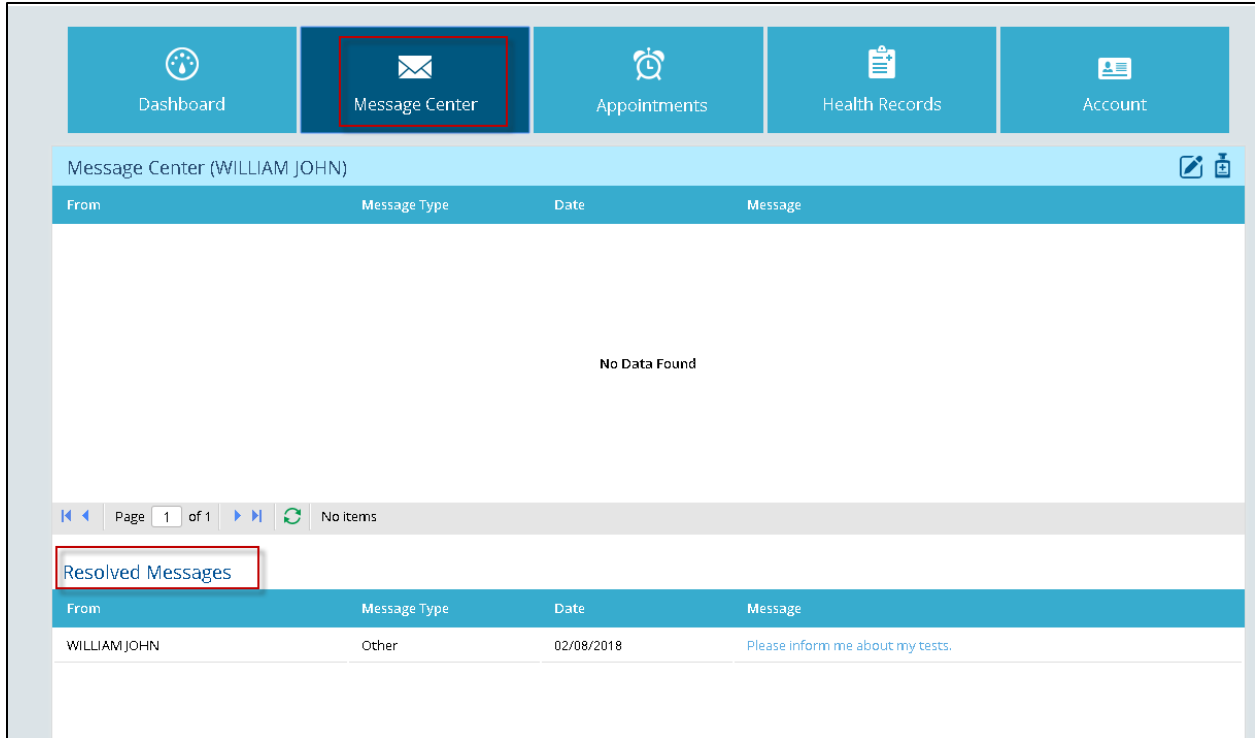
Patient can view the message reply by clicking on the message hyperlink, as shown in the image below:



Patient can then resolve this message by clicking on the **“Mark as Resolved”** link, as shown in the image below:



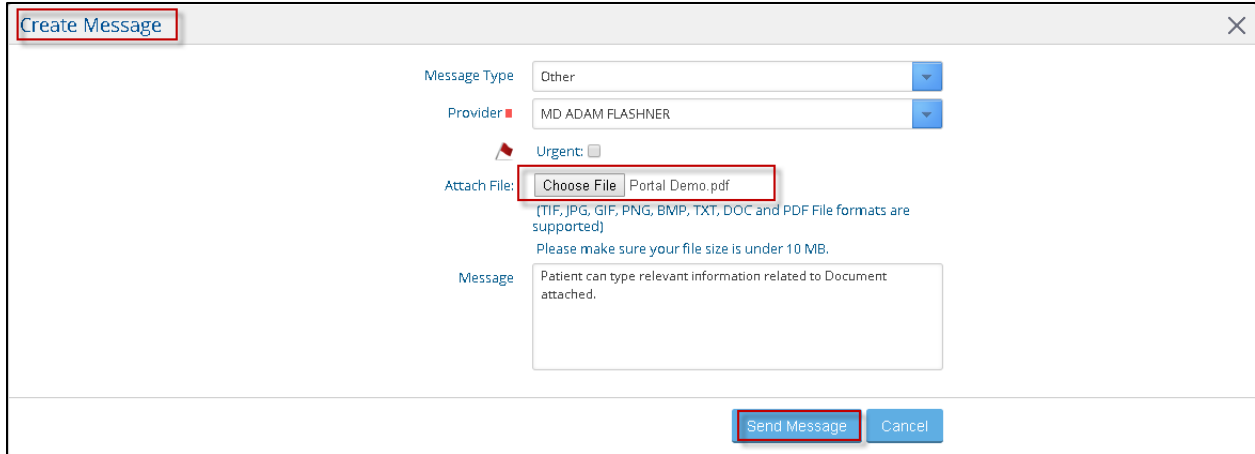
Patient can see resolved messages under **“Resolved Messages”**, as shown in the image below:



## **Attaching and Sending a File through Patient Portal**

Patient can attach and send a file with the message. To send a file:

- Step 1. Click on **New Message** icon from dashboard or from Message Center in navigation bar.
- Step 2. Select the **Message Type** and **Provider**.
- Step 3. Click **Choose File** button in the create message window.

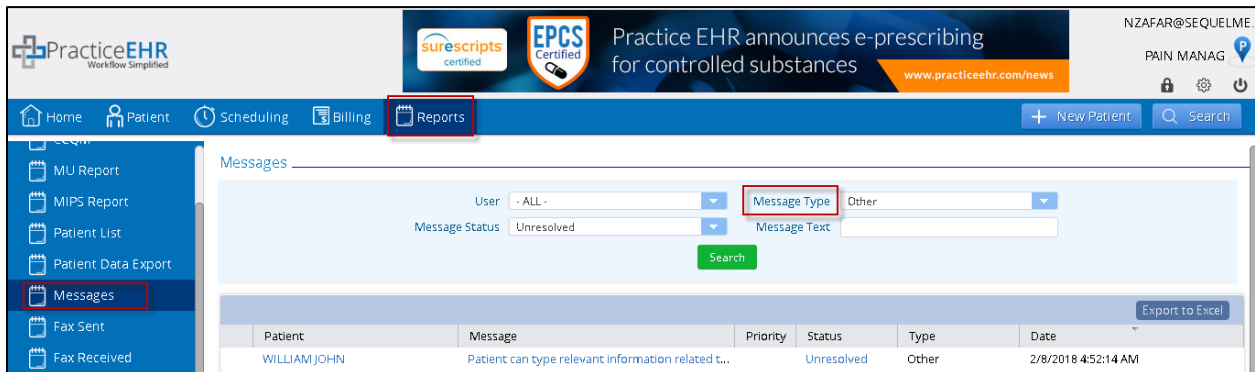


- Step 4. Select the file on your computer which you want to attach and send.
- Step 5. Click on **Send Message** button at the bottom to proceed with sending the attached file.

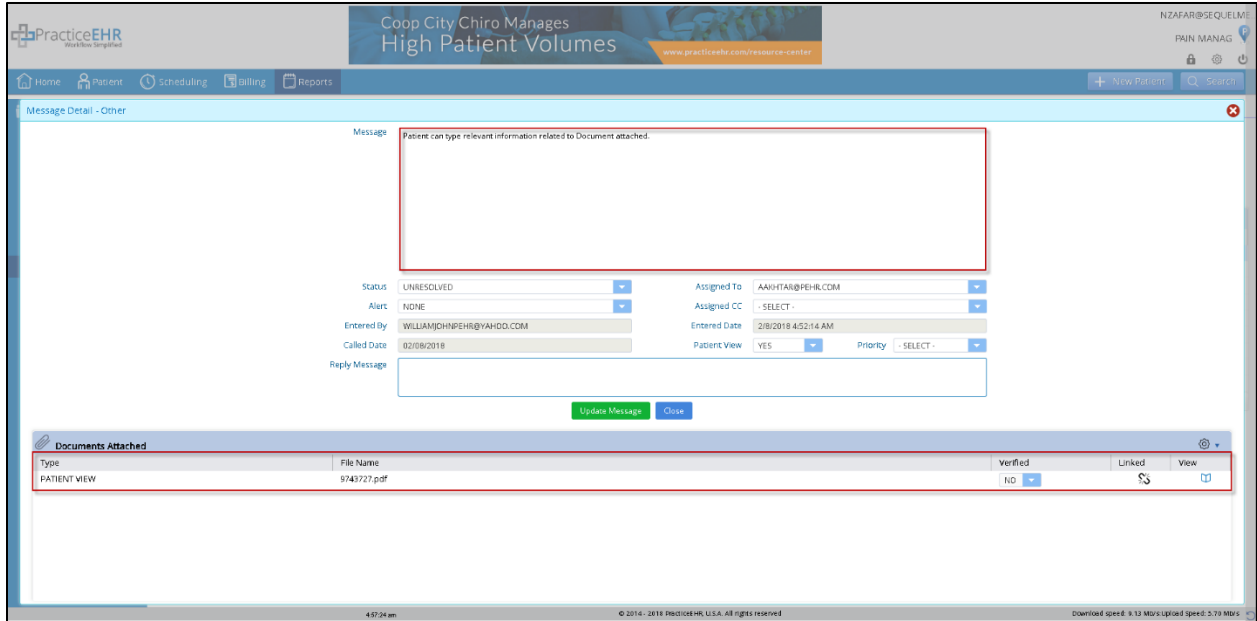
**Note:** The patient portal only allows file size under 10 MB to attach and send with the message.

## Patient Message in Practice EHR

In Practice EHR messages sent by the patient (via patient portal) will be received in Reports under “**Patient Messages**”, as shown in the image below:



In Practice EHR user can see the message detail by click on message hyperlink as shown in the image below:

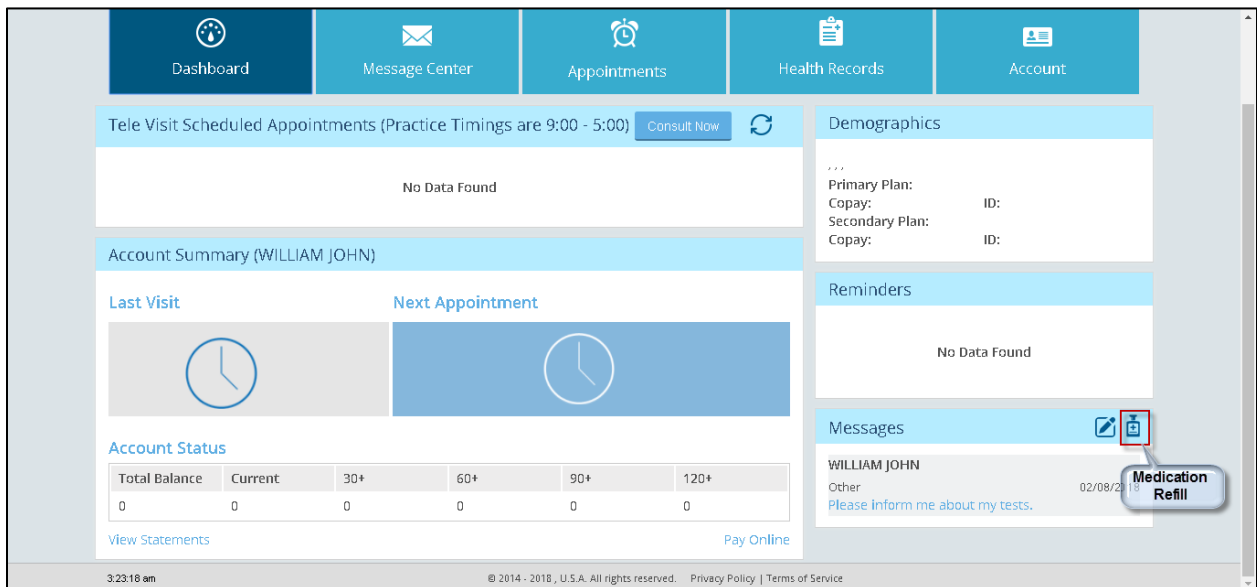


In Practice EHR user can then reply to Message as previously discussed in detail above.

## Send Medication Refill Requests

To send medication refill request:

Step 1. Click on **Medication Refill** icon from Dashboard.



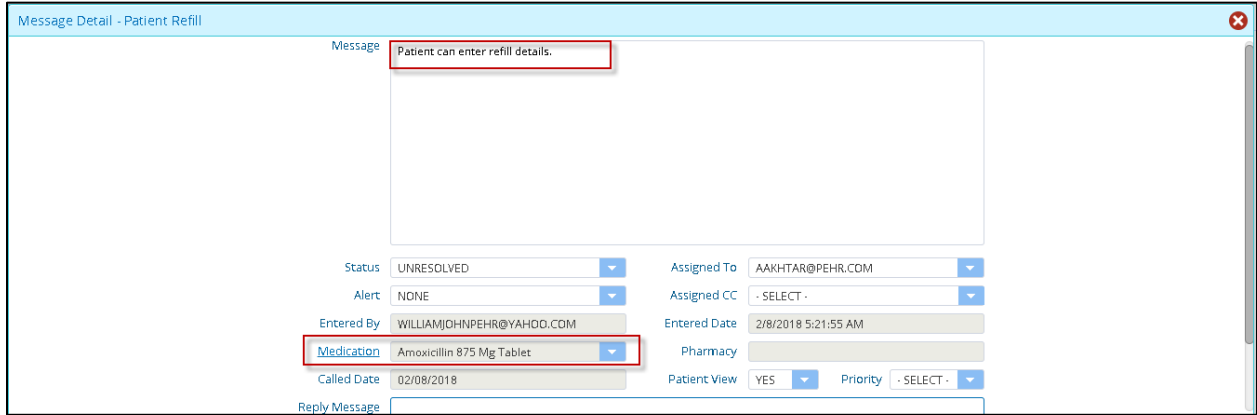
- Step 2. Create message window will open with Medication Refill option selected by default.
- Step 3. Patient can select Medication from Medication drop down. (The medication dropdown will show the list of already prescribed medications for the patient.)
- Step 4. Select the provider to whom patient wants to send a message.
- Step 5. Click on **Send Message** button to proceed with sending.

## **Medication Refill Message in Practice EHR**

In Practice EHR messages which have been sent by the patient (via patient portal) will be available in Reports under “**Patient Messages**” with message type as ‘Patient Refill’ as shown in the image below:

Patient	Message	Priority	Status	Type	Date
WILLIAM JOHN	Patient can enter refill details.		Unresolved	Patient Refill	2/8/2018 5:21:55 AM

In Practice EHR user can see the message detail by click on message hyperlink as shown in the image below:

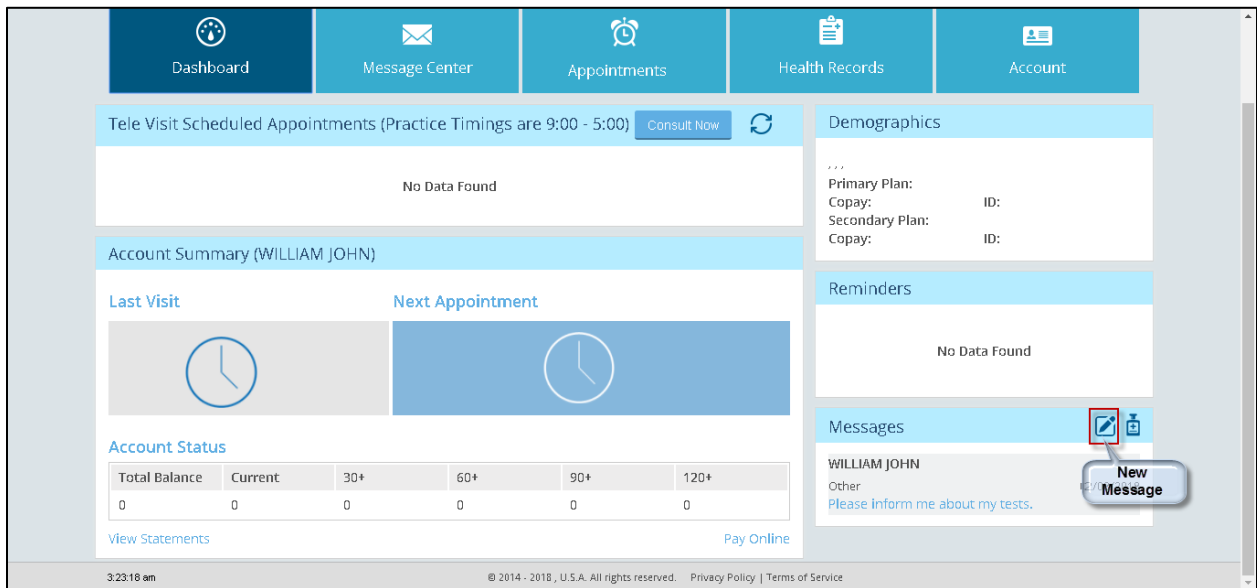


In Practice EHR user can then reply to Message as previously discussed in detail above.

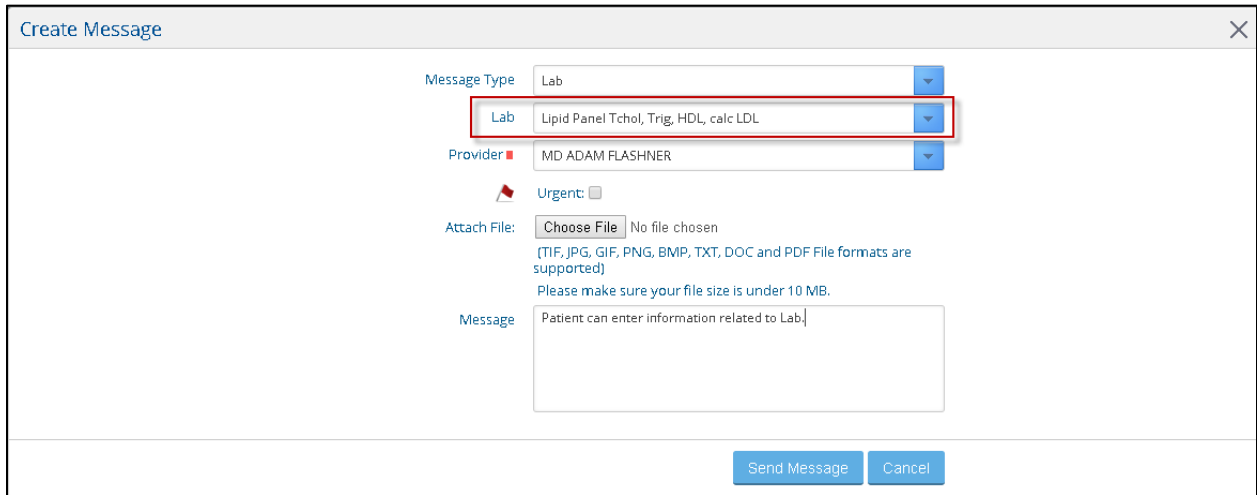
### **Send a Lab Message**

Here is how patient can send lab type messages:

Step 1. Click on **New Message** icon from dashboard.

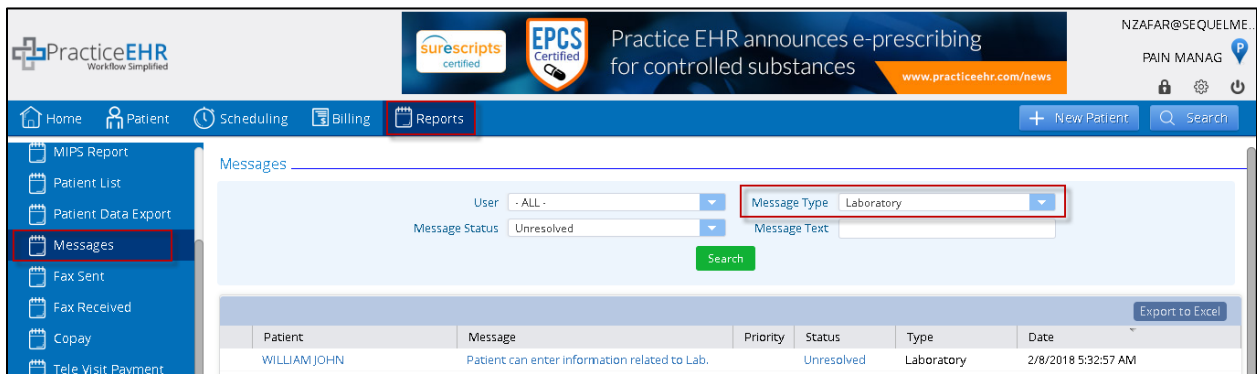


- Step 2. Select **Lab** in message type field.
- Step 3. Select lab **test**.
- Step 4. Type message in the message field.
- Step 5. Click on **Send Message** button.

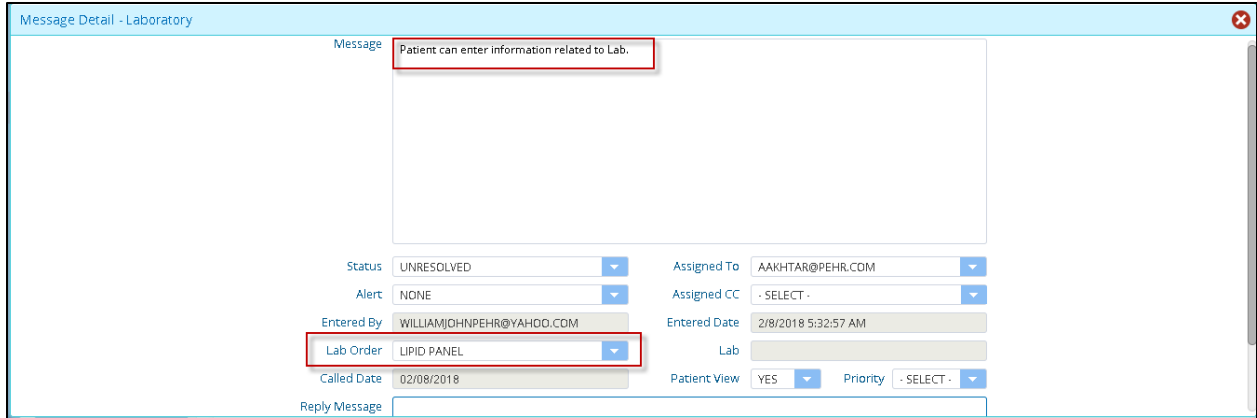


## **Lab Message in Practice EHR**

In Practice EHR messages which have been sent by the patient (via patient portal) will be available in Reports under “**Patient Messages**” with message type as ‘**Laboratory**’ as shown in the image below:



In Practice EHR user can see the message detail by click on message hyperlink as shown in the image below:

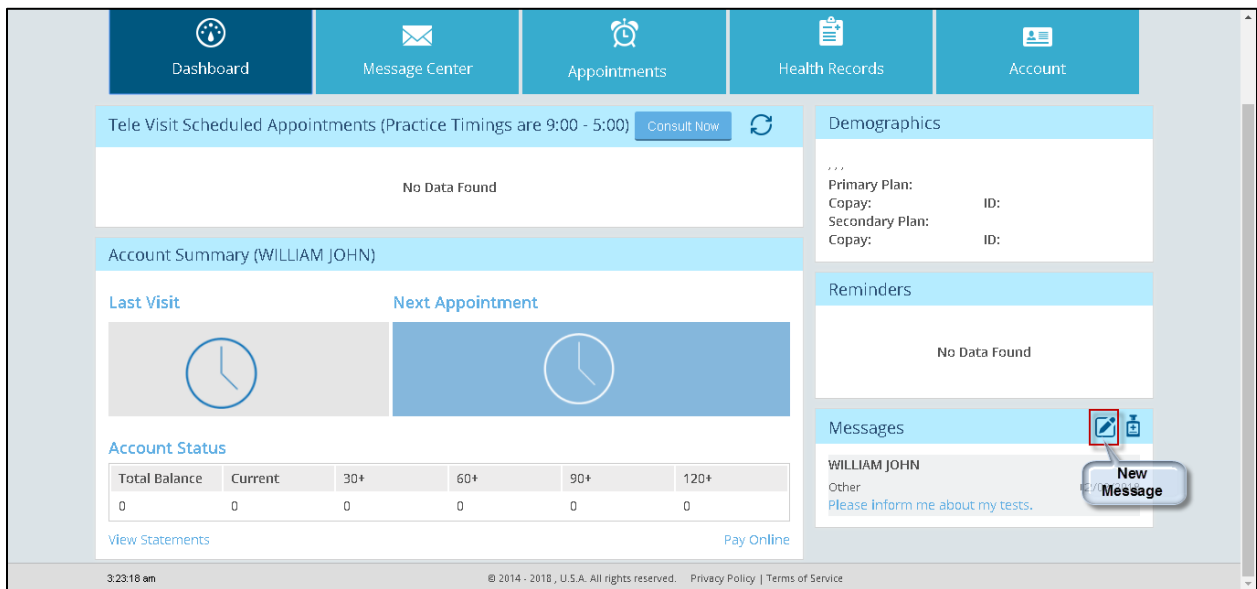


In Practice EHR user can then reply to Message as previously discussed in detail above.

### **Send Request for Amendments in PHI**

Here is how patient can send amendment type messages (for example to request any modification or amendment in the patient’s personal health information)

Step 1. Click on **New Message** icon from dashboard.



- Step 2. Select **Amendment** in message type dropdown
- Step 3. Select provider.
- Step 4. Type amendments in the message body
- Step 5. Click on **Send Message** button.

## **Amendment Message in EHR**

In Practice EHR messages which have been sent by the patient (via patient portal) will be available in Reports under “**Patient Messages**” with message type as ‘**Amendment**’ as shown in the image below:

Patient	Message	Priority	Status	Type	Date
WILLIAM JOHN	Patient can type amendments in the message ...		Unresolved	Amendment	2/8/2018 5:44:03 AM

In Practice EHR user can see the message detail by click on message hyperlink as shown in the image below:

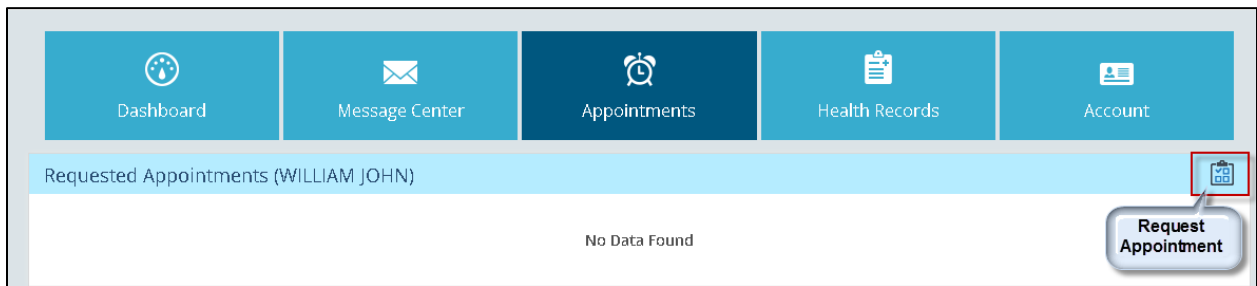
In Practice EHR user can then reply to Message as previously discussed in detail above. User can also reply by simply click on **Accept** or **Deny** button.

## Request Appointment

Patient can send an appointment request to practice for a preferred time.

### To schedule an appointment with the provider:

- Step 1. Click on **Appointments**
- Step 2. Request appointment window will open.
- Step 3. Click on Request Appointment icon.



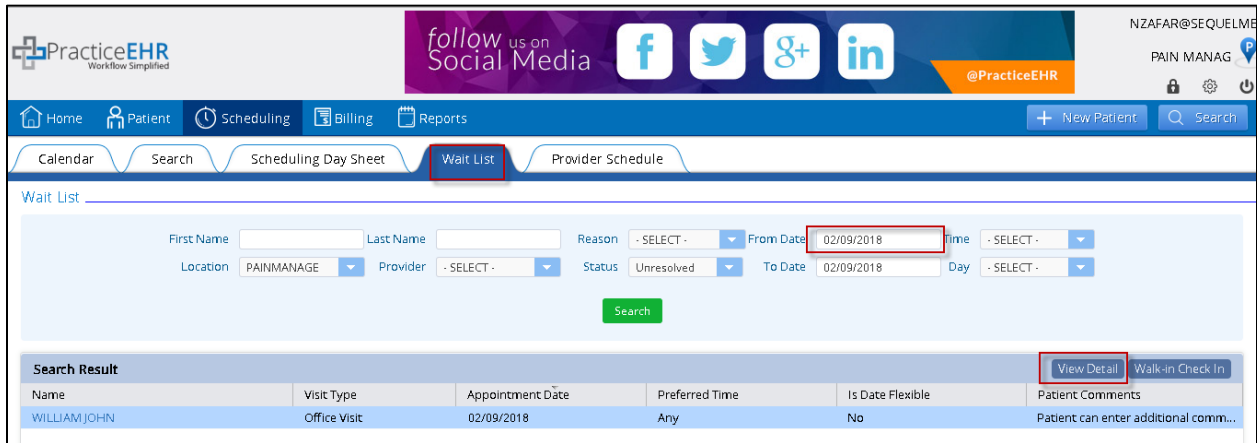
- Step 4. Pop up window will open.
- Step 5. Patient can select preferred time.
- Step 6. Patient may add any comment, (For example, a message describing the reason for appointment) which will go with the appointment request.
- Step 7. After filling the information, click on **Request Appointment** button.

The appointment request will be sent to the practice.

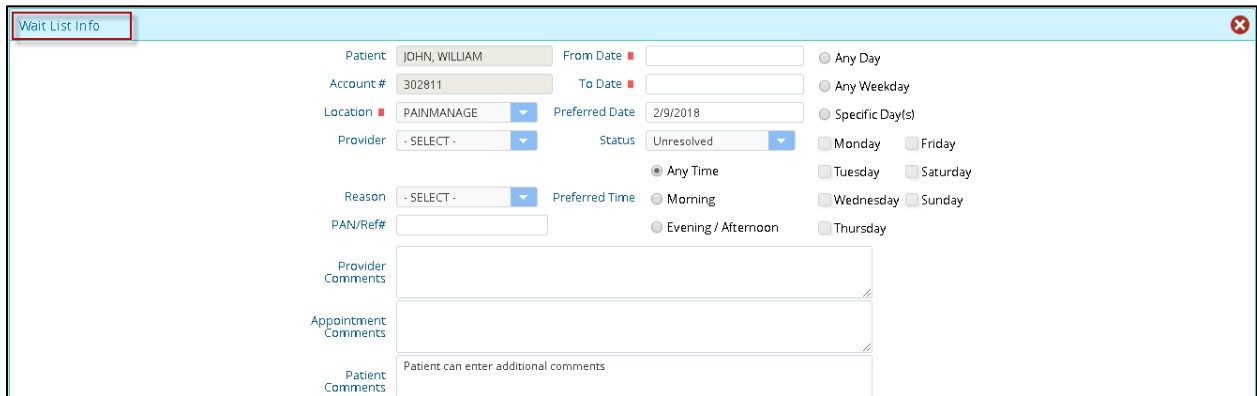
The 'Request Appointment' window contains the following fields and options:

- Office Visit:** Radio button selected.
- Appointment Date:** Text input field with '02/09/2018' and a calendar icon.
- Location:** Dropdown menu with 'PAINMANAGE' selected.
- Flexible Date:** Unchecked checkbox.
- Preferred Time:** Radio buttons for 'Any Time' (selected), 'Morning', and 'Afternoon/Evening'.
- Comments:** Text area with placeholder text 'PATIENT CAN ENTER ADDITIONAL COMMENTS'.
- Buttons:** 'Request Appointment' and 'Cancel' buttons at the bottom right.

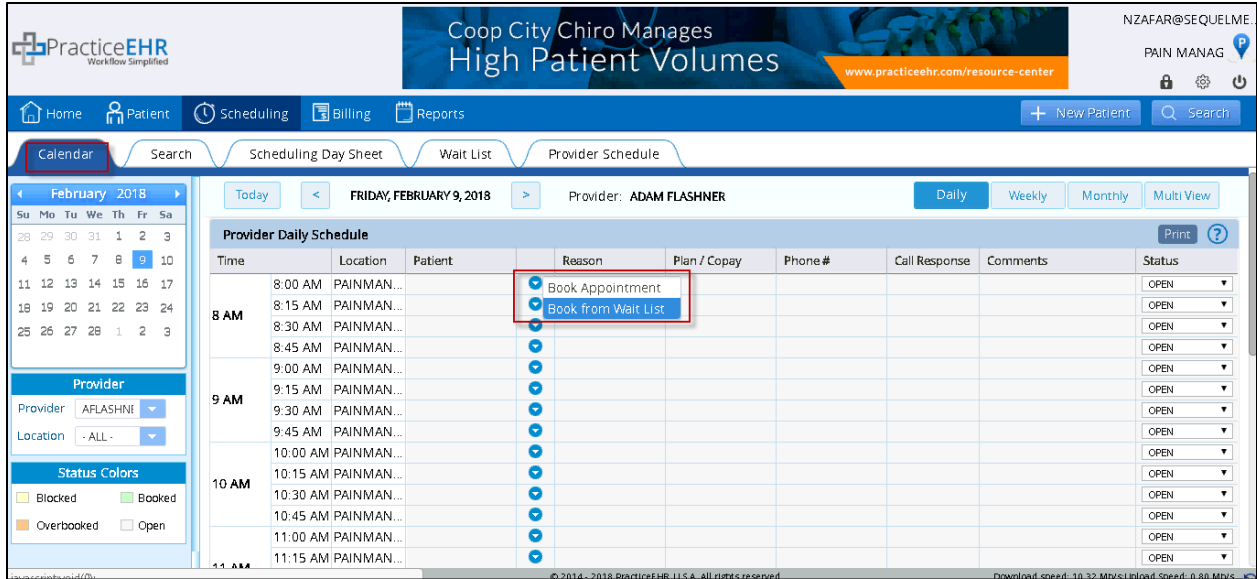
- The appointment requests sent through the patient portal are received in Scheduling under 'Wait List' window in Practice EHR.



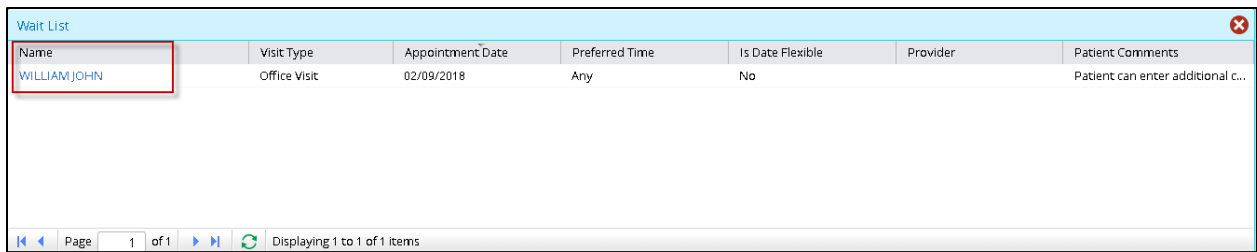
In wait list window, Practice EHR user clicks on the View detail button to view appointment detail.



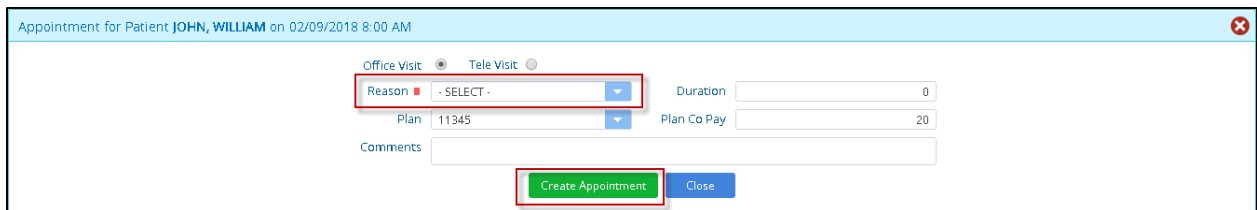
- Go to Calendar and book requested appointment on open slot.
- Mouse hover on Drop down icon and click on **Book From Wait List**.



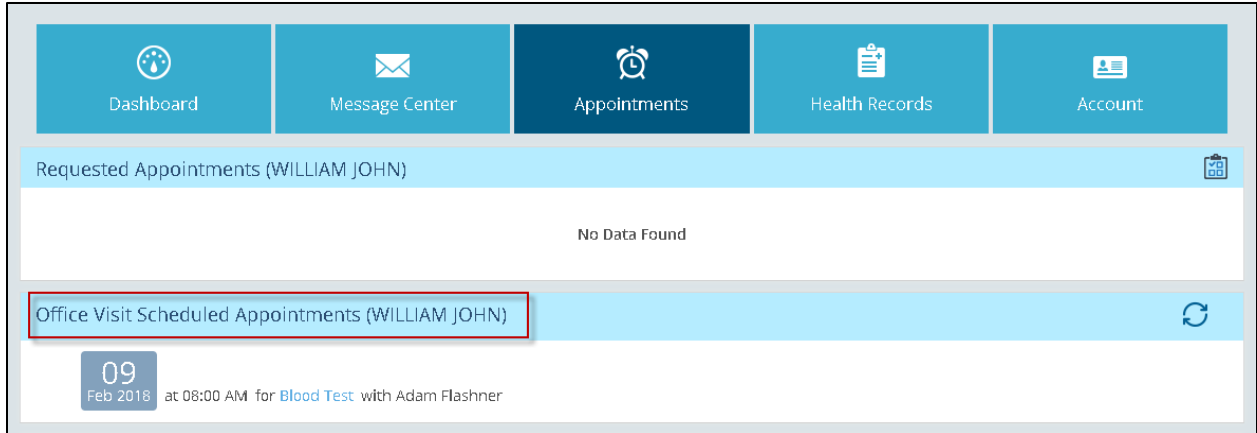
- Wait list window will open.
- Click on Patient Name hyperlink.



- Appointment window will open.
- Select Reason and click on **Create Appointment** button.



- Requested appointments which are booked from Practice EHR will appear under **"Office Visit Scheduled Appointments"**, as shown in the image below:

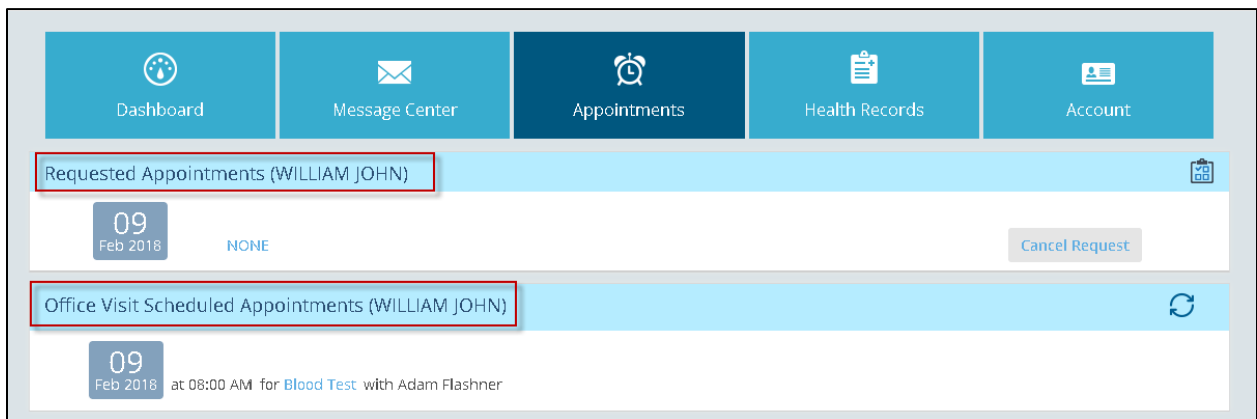


## **Patient Portal Appointments Window**

By clicking on the **Appointments tab** patient can see:

1. Requested appointments
2. Scheduled appointments

Please see image below:



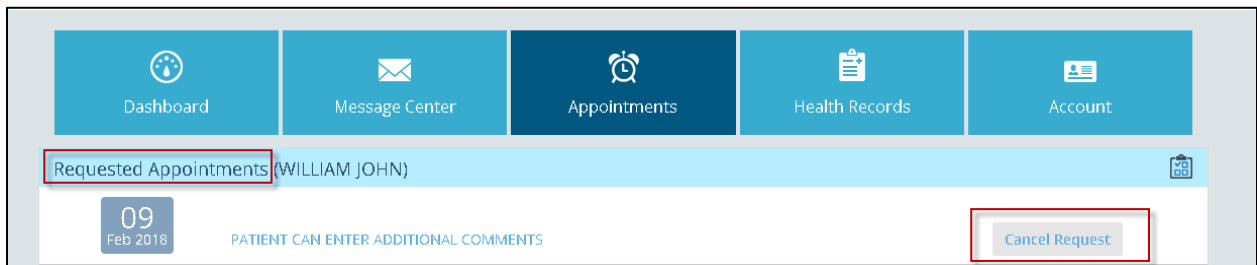
## **Patient Portal Cancel Appointments**

### ➤ **Cancel Requested Appointments**

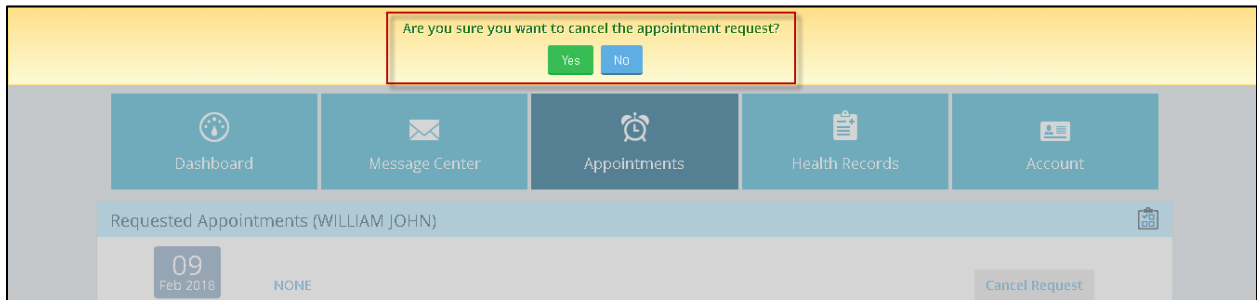
Patients can cancel their requested appointments by following the steps below:

Step 1. Click on "**Appointments**" Tab.

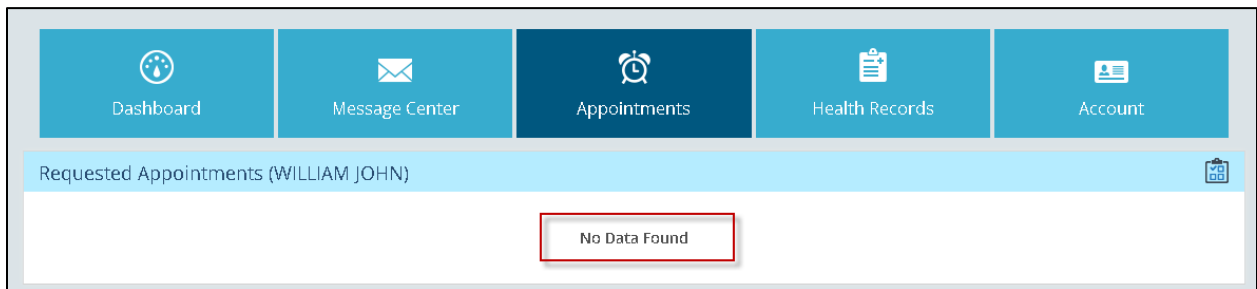
Step 2. Under "Requested Appointments", patient can click on "**Cancel Request**" and appointment will be canceled, please see image below.



When click on **Cancel Request button** confirmation message will appear on screen.



Requested Appointments which have been canceled by Patient will then remove from "**Requested Appointments**", please see image below:



- In Practice EHR “**Requested Appointments**” are also removed under ‘**Wait List**’, when **Cancel** by patient form portal as shown in the image below:

The screenshot shows the 'Wait List' search interface. At the top, there is a navigation bar with tabs for 'Calendar', 'Search', 'Scheduling Day Sheet', 'Wait List' (which is highlighted with a red box), and 'Provider Schedule'. Below the navigation bar, the 'Wait List' section contains a search form with the following fields: First Name, Last Name, Reason (dropdown), From Date (02/09/2018), Time (dropdown), Location (PAINMANAGE dropdown), Provider (dropdown), Status (Unresolved dropdown), To Date (02/09/2018), and Day (dropdown). A green 'Search' button is located below the search form. Below the search form is a 'Search Result' table with columns: Name, Visit Type, Appointment Date, Preferred Time, Is Date Flexible, and Patient Comments. A 'No Data Found' message is displayed in a box at the bottom of the table.

## View, Download & Transmit Health Records

As per requirement of Meaningful Use program, providers must offer their patients the functionality to view their health information, download it in both human and machine readable formats, and electronically transmit it.

- Patient can access View, Download and Transmit functionality of patient portal by clicking on the Health Record tab on the navigation bar.

The screenshot displays the 'Health Records' section of a patient portal. At the top, there are navigation tabs: Dashboard, Message Center, Appointments, Health Records (highlighted with a red box), and Account. Below the tabs, the patient's name 'WILLIAM JOHN' is shown, along with three action buttons: 'View C-CDA', 'Download C-CDA', and 'Transmit C-CDA' (all highlighted with a red box). The main content area is divided into several sections:

- Patient Generated Health Data:** A section with an 'Add New' button and the text 'No Data Found'.
- Current Problem List:** A table with the following details:
 

Description	Unspecified Mood [Affective] Disorder
Problem Status	Diagnosed
ICD Code	F39
- Current Medications:** Two medication cards. The first card shows:
 

Visit Date	
Medicine	Amoxicillin 875 Mg Tablet
Status	Prescribed
Prescribed By	Adam Flashner

 The second card shows:
 

Visit Date	02/07/2018
Medicine	Ambien 10mg Tablet
Status	Prescribed
Prescribed By	Adam Flashner
- Immunization Schedule:** A table with the following details:
 

Entry Date	02/08/2018
Description	Diphtheria, tetanus, & acellular pertussis3 (D...
Entered By	
- CDS Intervention:** A section that is currently empty.

- Along with the View, download and transmit functionality, the 'Health Record' page of the Practice EHR Patient Portal displays elaborate health information.

## View Patient Health Information

To view patient's health records:

- Step 1. Go to **Health Record** tab.
- Step 2. Click on **View C-CDA** icon.

The screenshot shows the patient portal interface for WILLIAM JOHN. At the top, there are navigation tabs: Dashboard, Message Center, Appointments, Health Records (selected), and Account. Below the tabs, the user's name and email (williamjohnpehr@yahoo.com) are displayed, along with a Logout button. The main content area is titled "Health Records(WILLIAM JOHN)" and includes a search bar with "View C-CDA", "Download C-CDA", and "Transmit C-CDA" options. The "View C-CDA" button is highlighted with a red box. Below this, there are sections for "Patient Generated Health Data" (No Data Found), "Current Problem List" (Unspecified Mood [Affective] Disorder, Diagnosed, ICD Code F39), "Current Medications" (Amoxicillin 875 Mg Tablet and Ambien 10mg Tablet), "Immunization Schedule" (Diphtheria, tetanus, & acellular pertussis3 (D...)), and "CDS Intervention".

- Step 3. Pop up window will open.
- Step 4. Patient can also view his health record based on date range. (From , To date)
- Step 5. Click on **View C-CDA** button.

The screenshot shows the "View C-CDA" pop-up window. It has a title bar with "View C-CDA" and a close button (X). Below the title bar, there are two date input fields: "From Date" with the value "02/08/2018" and "To Date" with the value "02/08/2018". Below these fields, there is a note: "Note: \* This will filter the data based on Encounter date and other data categories dates like Medication, Lab, Problem List etc". At the bottom of the window, there are two buttons: "View C-CDA" (highlighted with a red box) and "Cancel".

View Health Record(WILLIAM JOHN) View C-CDA Download C-CDA Transmit C-CDA

**Consolidated CDA**

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- [Results](#)
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- [Treatment plan](#)
- [Goals Section](#)
- [Health Concerns Section](#)
- [Reason for Referral](#)
- [Mental Status](#)
- [Chief Complaint](#)

**Patient Details**

<b>Patient</b>	WILLIAM JOHN	<b>Preferred Language</b>	
<b>Date of birth</b>	February 5, 1990	<b>Sex</b>	Male
<b>Race</b>		<b>Ethnicity</b>	
<b>Contact info</b>	Primary Home: , US	<b>Patient IDs</b>	2.16.840.1.113883.3.72
<b>Document Id</b>	5188ca31-b3bf-4d0c-8201-7c93cfff2e2c		
<b>Document Created:</b>	February 8, 2018, 06:11:41		
<b>Performer</b>	ADAM FLASHNER of PAIN MANAGEMENT		
<b>Author</b>	ADAM FLASHNER, PAIN MANAGEMENT		
<b>Contact info</b>	Work Place: CB 897 south NEW YORK, NY 10009, US		
<b>Encounter Id</b>	d2ab99cc-e7ca-4b6e-bcba-d3b086777832		
<b>Encounter Date</b>	,		
<b>Encounter Location</b>	PAIN MANAGEMENT		
<b>Responsible party</b>	ADAM FLASHNER		
<b>Contact info</b>	CB 897 south NEW YORK, NY 10009		
<b>Document maintained by</b>	PAIN MANAGEMENT		
<b>Contact info</b>	Work Place:		

➤ Patient can view their health information in C-CDA format.

## Download Health Records

Patients can download their health information in 'C-CDA' or 'Human Readable' format.

To download health records:

- Step 1. Go to **Health Record** tab
- Step 2. Click on **Download C-CDA** icon.

The screenshot shows the Patient Portal interface for WILLIAM JOHN. The top navigation bar includes Dashboard, Message Center, Appointments, Health Records (selected), and Account. Below the navigation bar, the page title is 'Health Records(WILLIAM JOHN)'. There are three action buttons: 'View C-CDA', 'Download C-CDA' (highlighted with a red box), and 'Transmit C-CDA'. The main content area is divided into several sections:

- Patient Generated Health Data:** No Data Found. An 'Add New' button is present.
- Current Problem List:**

Description	Unspecified Mood [Affective] Disorder
Problem Status	Diagnosed
ICD Code	F39
- Current Medications:**

Visit Date	02/07/2018
Medicine	Amoxicillin 875 Mg Tablet
Status	Prescribed
Prescribed By	Adam Flashner

Visit Date	02/07/2018
Medicine	Ambien 10mg Tablet
Status	Prescribed
Prescribed By	Adam Flashner
- Immunization Schedule:**

Entry Date	02/08/2018
Description	Diphtheria, tetanus, & acellular pertussis3 (D...
Entered By	
- CDS Intervention:** (Section header only, no data visible)

- Step 3. Pop up window will open.
- Step 4. Patient can also download his health record based on date range (From , To date)
- Step 5. Click on type (Download C-CDA XML/ Download Human Readable) to download.

Download C-CDA

Data Filter

From Date 02/08/2018 To Date 02/08/2018

Note: \* This will filter the data based on Encounter date and other data categories dates like Medication, Lab, Problem List etc

Download C-CDA XML Download C-CDA Human Readable Cancel

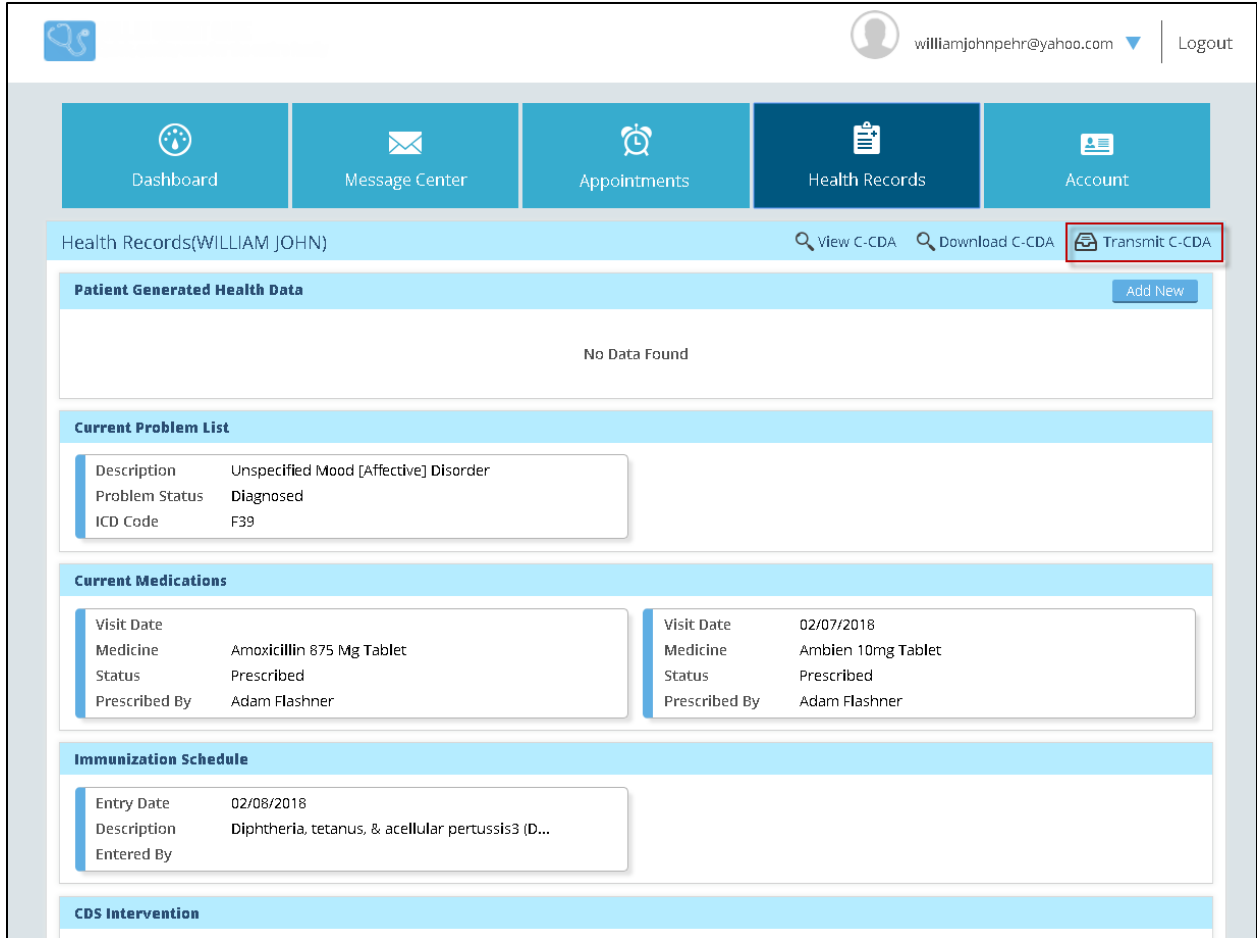
Step 6. Health information will be downloaded in the default download folder.

## **Transmit Health Records**

The 'Transmit' functionality allows the user to transmit health information through a secure email service, in C-CDA/HTML document formats.

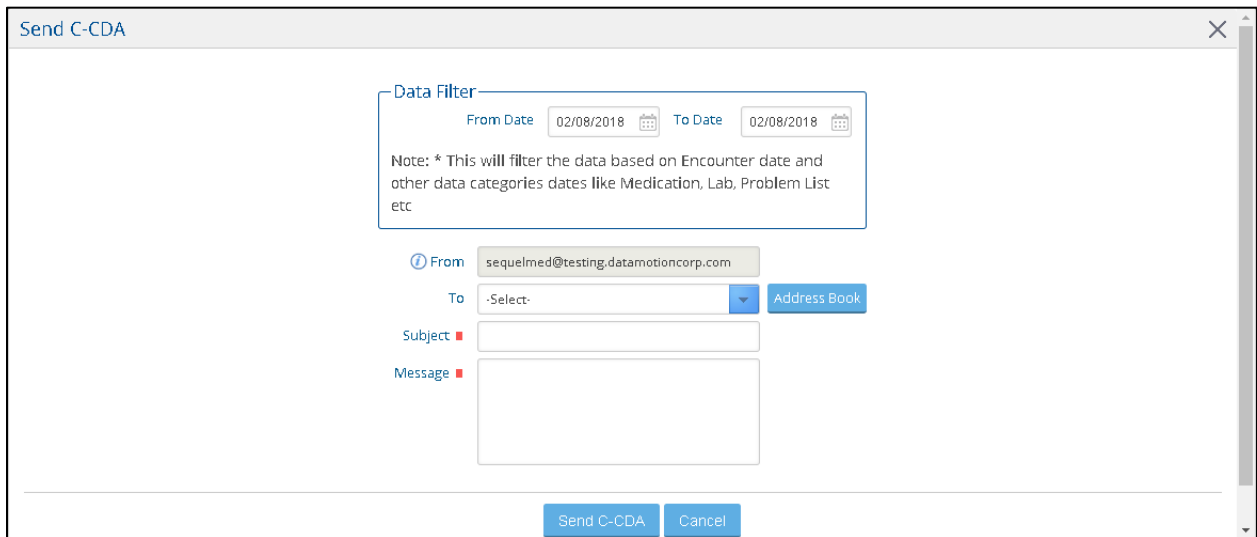
To transmit health records:

- Step 1. Go to **Health Record** tab
- Step 2. Click on **transmit** icon.

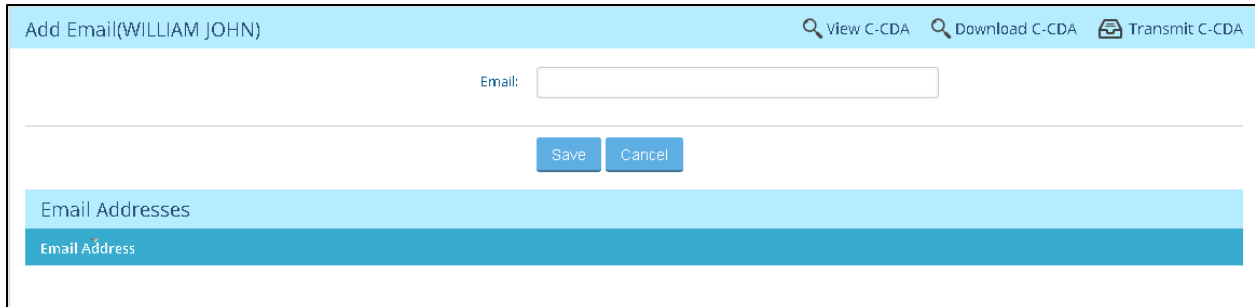


Step 3. Pop up window will open

Step 4. Patient can also transmit his health record based on date range (From , To date)



Step 5. Select the **email address** of the receiver or **add** a new email address via 'Address Book'.



The screenshot shows a web interface for adding an email address. At the top, there is a header bar with the text "Add Email(WILLIAM JOHN)" on the left and three icons with labels: "View C-CDA", "Download C-CDA", and "Transmit C-CDA". Below the header, there is a form with a label "Email:" followed by an empty text input field. Underneath the input field are two buttons: "Save" and "Cancel". At the bottom of the form, there is a section titled "Email Addresses" with a sub-section "Email Address" highlighted in a darker blue color.

Step 6. Enter subject line and message for the receiver.

Step 7. Click on '**Send C-CDA**' button.

Health information will be sent in the C-CDA file format.

## Patient Account View

---

Patients can view Demographics and Insurance related information by clicking the **Account** tab on the navigation bar on patient portal.

See the image below:

The screenshot displays a patient portal interface. At the top right, the user is logged in as 'williamjohnpehr@yahoo.com' with a 'Logout' link. A navigation bar contains five tabs: 'Dashboard', 'Message Center', 'Appointments', 'Health Records', and 'Account'. The 'Account' tab is highlighted with a red rectangular box. Below the navigation bar, the 'Demographics (WILLIAM JOHN)' section lists personal details: Account # 302811, DOB 02/05/1990, SSN 000-00-0000, Name WILLIAM JOHN, Sex Male, Marital Status Single, Address 1, Address 2, City NEW YORK, State NY, Zip 10007, Home Tel # (121) 254-5464, Work Tel # (612) 547-8888, and Cell # (121) 544-8765. The 'Insurance Plans' section shows two entries for 'COMMERCIAL' insurance, with fields for Name, SSN, DOB, Sex, Relationship, Address 1, Address 2, City, State, Zip-Ext, Plan, ID #, Visit Co Pay, Date Signed, Effective Date, and Expiration Date.

## **Setting Access Rights for the Portal User**

The access rights for a patient can be set through Patient Portal via Email link.

There are two types of **Rights** settings:

**Type 1: 'Whom I Represent'**

**Type 2: 'Who Represents Me'**

- By adding a shared account on **Whom I Represent** the portal user can also access health information of other shared patient.
- By adding a share account on **Who Represents Me** the added user gets the rights and permissions to access the health information of this patient.

View the details on the following pages.

### **Setting Portal user rights for 'Whom I Represent'**

- Step 1. When any portal user **Share Account with You**. (Suppose **ELTON JOHN** share his account with **WILLIAM JOHN**).
- Step 2. Login patient portal with WILLIAM JOHN.
- Step 3. Go to **Account** tab and scroll down to My Representatives.
- Step 4. Under **WHOM I REPRESENT (ELTON JOHN)** will appear.
- Step 5. Now WILLIAM JOHN can access health information of ELTON JOHN

My Representatives

Whom I Represent

Names

302002 ELTON JOHN INTAKE

### **Patient Representatives 'Who Represent Me'**

- Open **Patient Portal** and go to **Account** tab.
- Scroll down to My Representatives.
- Go to **'Who Represent Me'**
- Add the portal user email with whom to **Share Account With**.

The screenshot shows the 'My Representatives' section. On the left, under 'Whom I Represent', there is a 'Names' field that currently displays 'No Data Found'. On the right, under 'Who Represents Me', there is an 'Email' field with the address 'ejohnpehr7@gmail.com'. Below this, there is a 'Send Request' button. Further down, the same email address is shown in a separate field with a red 'x' icon and a 'Resend Email' button.

- The user account will be added who can see this patient’s portal account information.

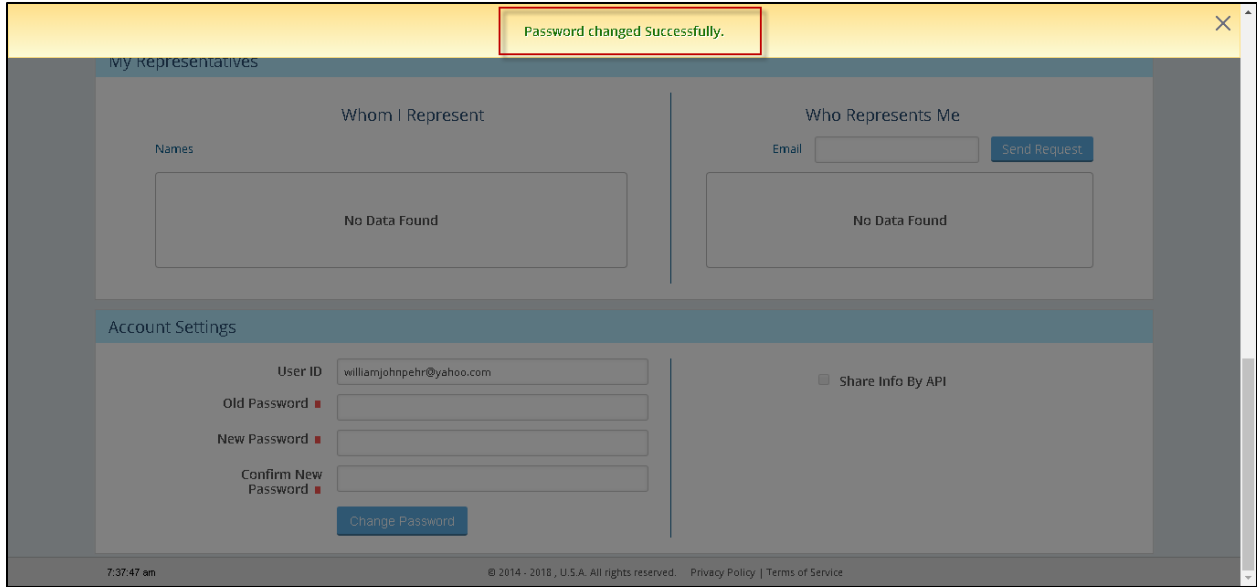
## Changing Patient Login Password

To change the login password:

- Step 1. Go to Account tab.
- Step 2. Scroll down to **Account Settings**.

The screenshot shows the 'Account Settings' section. It features a 'User ID' field with the value 'williamjohnpehr@yahoo.com'. Below this are three password fields: 'Old Password', 'New Password', and 'Confirm New Password', each with a red square icon to its left. A blue 'Change Password' button is positioned below the password fields. To the right, there is a checkbox labeled 'Share Info By API'.

- Step 3. First, enter old password.
- Step 4. Then enter the **new password** and **confirm new password**.
- Step 5. Click on **Change Password** button.  
The portal will prompt with the message 'Password Changed Successfully'

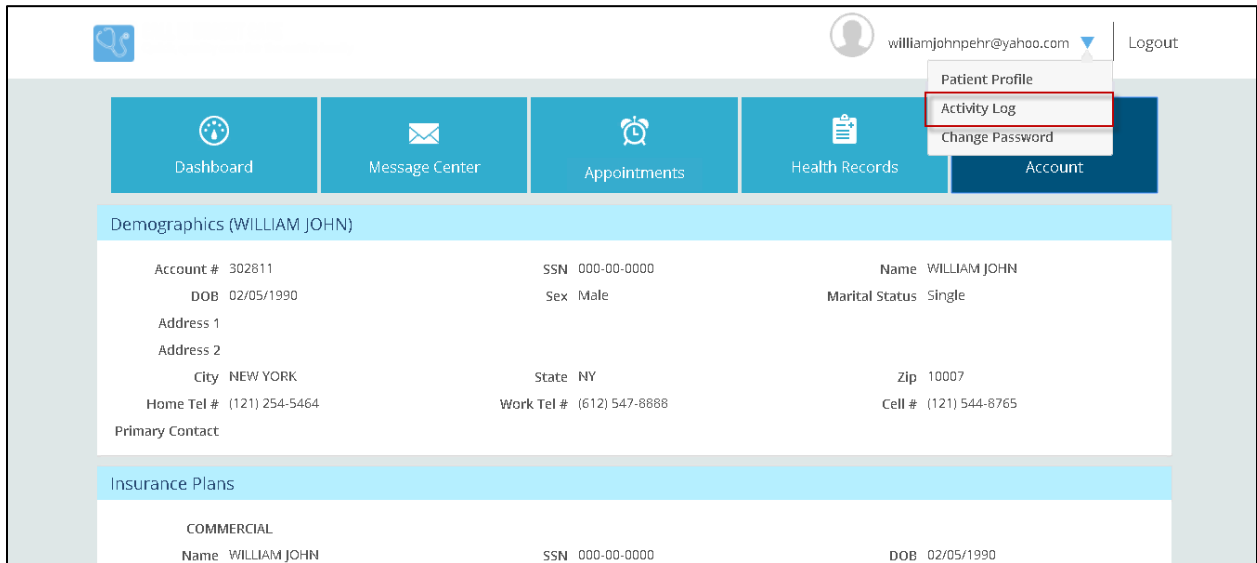


## View Portal Activity Log

Patients can view their patient portal account Activity Log.

To view Activity Log:

- Step 1. Mouse hover on Action menu along with user email click on '**Activity Log**'.



Step 2. Pop up window will open.

Step 3. Select date range. (Patient can also apply page and action filters to refine the search.)

Step 4. Click on **Search History** button.

The system will generate the user activity log for the search filters applied.

Page	Action Name	Date & Time (EDT)	Accessed By	Email To	IP
Account	View	2/8/2018 6:25:35 AM	williamjohnpehr@yahoo.com		58.65.135.34
Account	View	2/8/2018 6:25:20 AM	williamjohnpehr@yahoo.com		58.65.135.34
Account	View	2/8/2018 6:24:09 AM	williamjohnpehr@yahoo.com		58.65.135.34
Account	View	2/8/2018 6:23:14 AM	williamjohnpehr@yahoo.com		58.65.135.34
Health Records	View C-CDA	2/8/2018 6:11:41 AM	williamjohnpehr@yahoo.com		58.65.135.34
Health Records	View C-CDA	2/8/2018 6:08:13 AM	williamjohnpehr@yahoo.com		58.65.135.34
Health Records	View	2/8/2018 5:59:27 AM	williamjohnpehr@yahoo.com		58.65.135.34

Page 1 of 1 | Displaying 1 to 7 of 7 items

There are two additional types of patient registration available on the patient portal login menu bar.

**Type 1: Existing Patient Registration**

**Type 2: New Patient Registration**

The screenshot shows a login interface with the following elements:

- An input field for 'Email' with an envelope icon.
- An input field for 'Password' with a lock icon.
- A link labeled 'Forgot Password?'.
- A large blue button labeled 'Login'.
- A menu with two options: 'Existing Patient Registration' and 'New Patient Registration'. This menu is enclosed in a red rectangular border.

### **Type 1: Existing Patient Registration**

Patients already registered in Practice EHR are considered existing patients.

If an existing patient wants the patient portal access, such patient should follow the steps below.

- Step 1. Click on '**Existing Patient Registration**' on the portal login menu bar.
- Step 2. Patient registration form will open.

Existing Patient Registration

First Name ■ ROBERT

Last Name ■ JAMES

Email ■ ROBERTJAMESPEHR1@GMAIL.COM

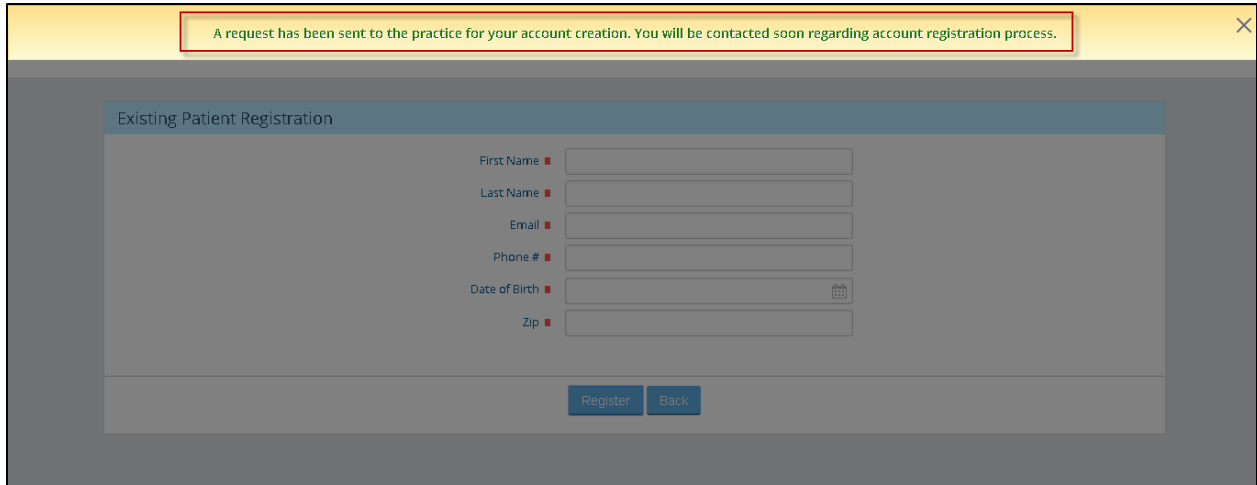
Phone # ■ (564) 789-9999

Date of Birth ■ 01/24/1990

Zip ■ 10007

Register Back

Step 3. Enter the required information: 'First Name', 'Last Name', 'Email', 'Phone #', 'Date of Birth' and 'zip'. Then click on **Register** button, message will appear on screen as shown in the image below:



## Register Existing Patient in EHR

In Practice EHR registration request by existing patient which have been sent (via patient portal) will be available in Reports under "**Patient Messages**" with message type as 'Other' as shown in the image below:

Home Patient Scheduling Billing Reports Setup + New Patient Search

Patient List  
Patient Data Export  
Messages  
Fax Sent  
Fax Received  
Copay  
Tele Visit Payment  
Clinical Visits

Messages

User - ALL - Message Type Other

Message Status Unresolved Message Text

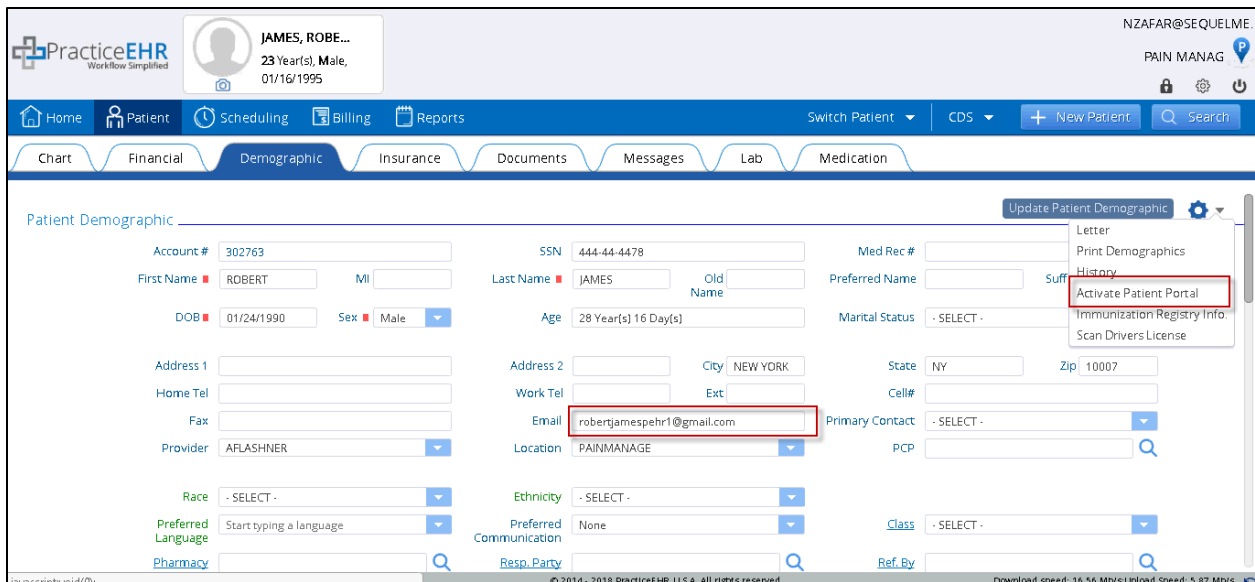
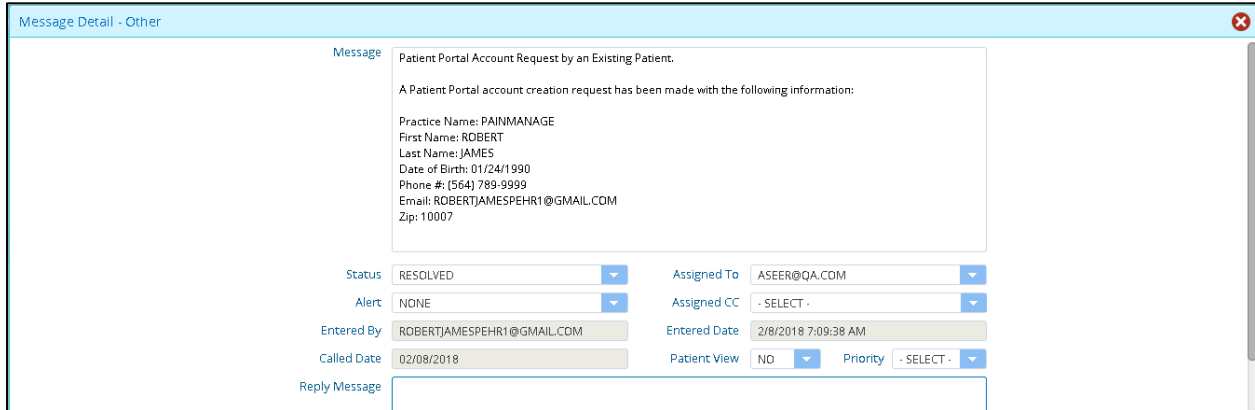
Search

Export to Excel

Patient	Message	Priority	Status	Type	Date
JOHN DOE	Patient Portal Account Request by an Existing ...		Unresolved	Other	2/8/2018 7:09:38 AM

In Practice EHR user click on message hyperlink to see the details and update message then complete the process of registration as previously discussed in detail above.

Please see below images:



## Type 2: New Patient Registration

A patient who is not registered in Practice EHR is considered as '**New Patient**'.

If a new patient wants to get registered with the practice and have a patient portal access such patient should follow these steps:

- Step 1. Follow the link for '**New Patient Registration**' on the portal login menu bar.
- Step 2. The new patient registration form will open.

New Patient Registration

First Name ■ DAVID

Last Name ■ BROWN

SSN 456-12-3987

Date of Birth ■ 02/08/1989

Email ■ DAVIDBROWN@GMAIL.COM

Gender ■ Male

TeleVisit ■ Yes

Pharmacy DUANE READE - 305 Broadway

Drug History Consent

Address 324 SOUTH WALE

Zip / City / State 10007 NEW YORK NY

Home # ((051) 468-7999)

Work # ((054) 698-7777)

Cell # ■ ((236) 541-7888)

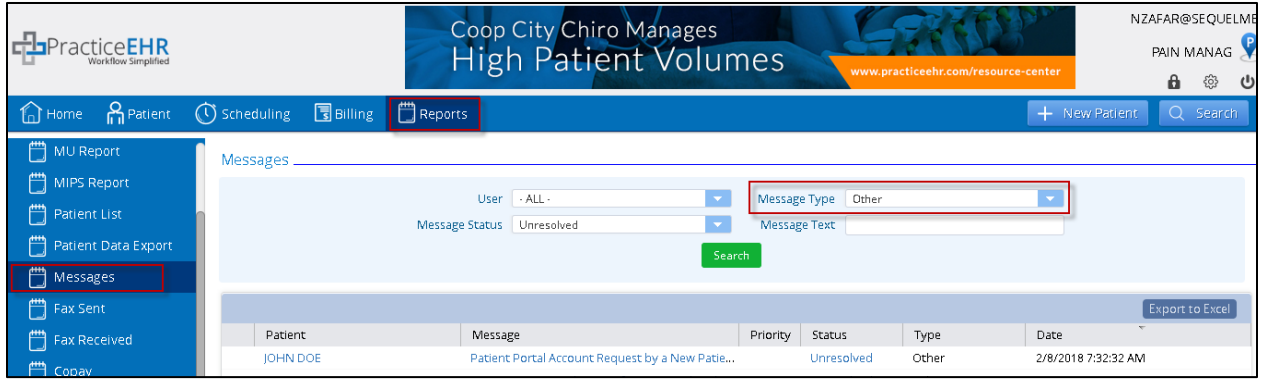
Comments PATIENT COMMENTS

Register Back

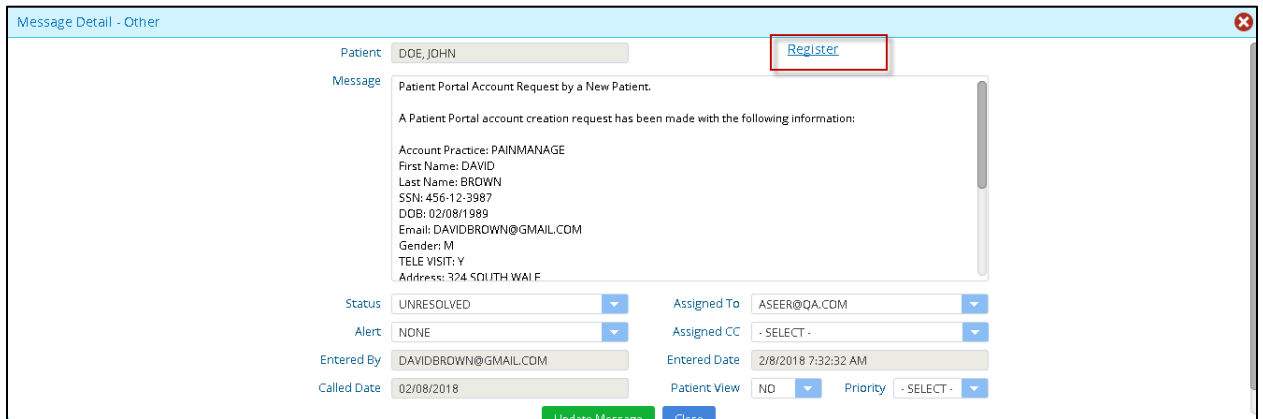
- Step 3. Enter complete or required information.
- Step 4. Click on '**Register**' button and after that patient will receive acknowledgement email request received.

### **Register New Patient in Practice EHR**

In Practice EHR registration request by new patient which have been sent (via patient portal) will be available in Reports under "**Patient Messages**" with message type as 'Other' as shown in the image below:



Practice EHR user then click on message hyperlink to see the details and from the Message Detail window, user can then create a new patient with information available in the Message body and complete the process of registration as previously discussed in detail above.

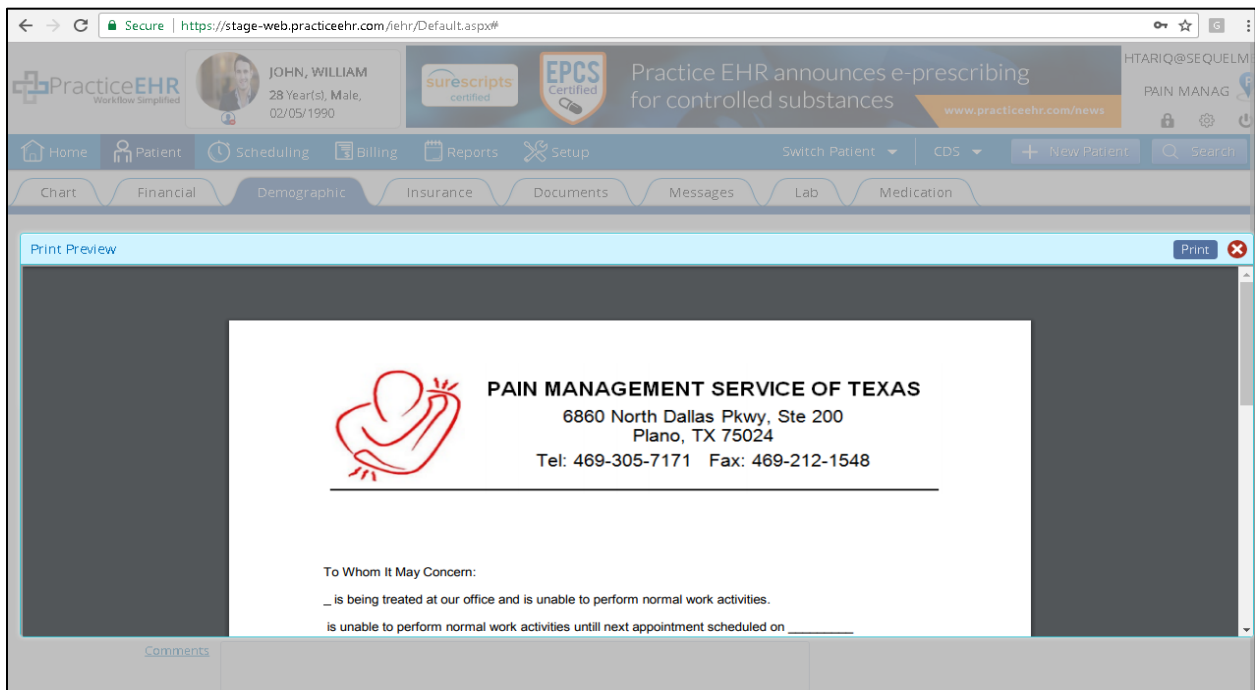
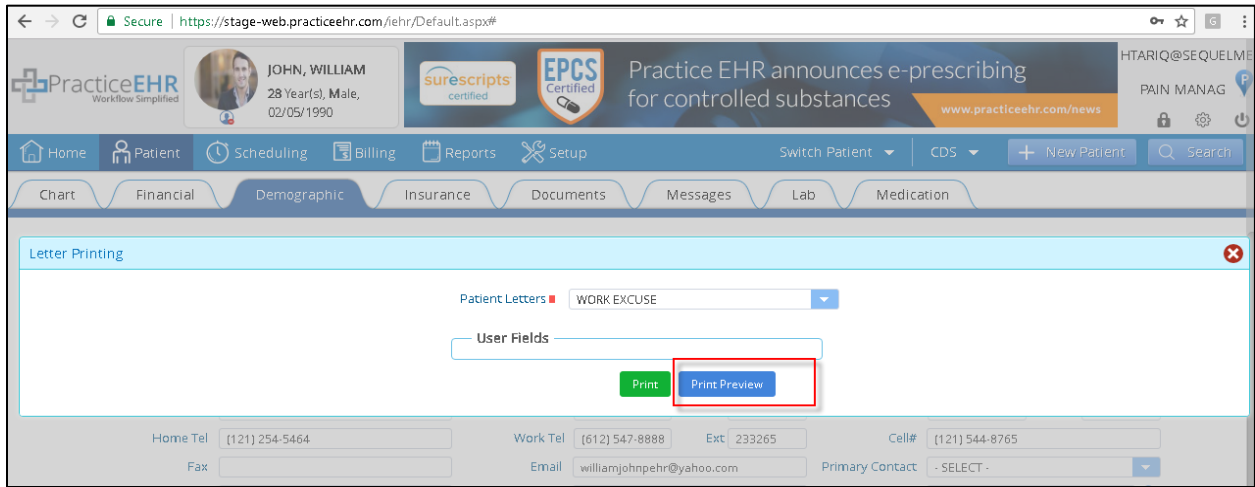


### **Patient’s Document View on Portal:**

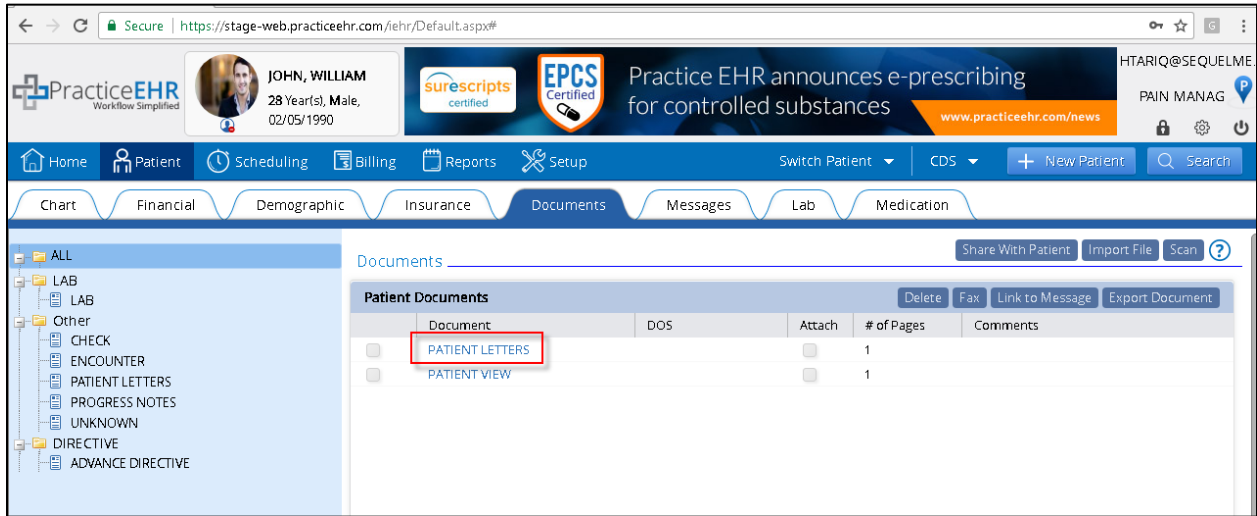
Go to patient’s Demographics in PEHR> Select Letter from Action menu



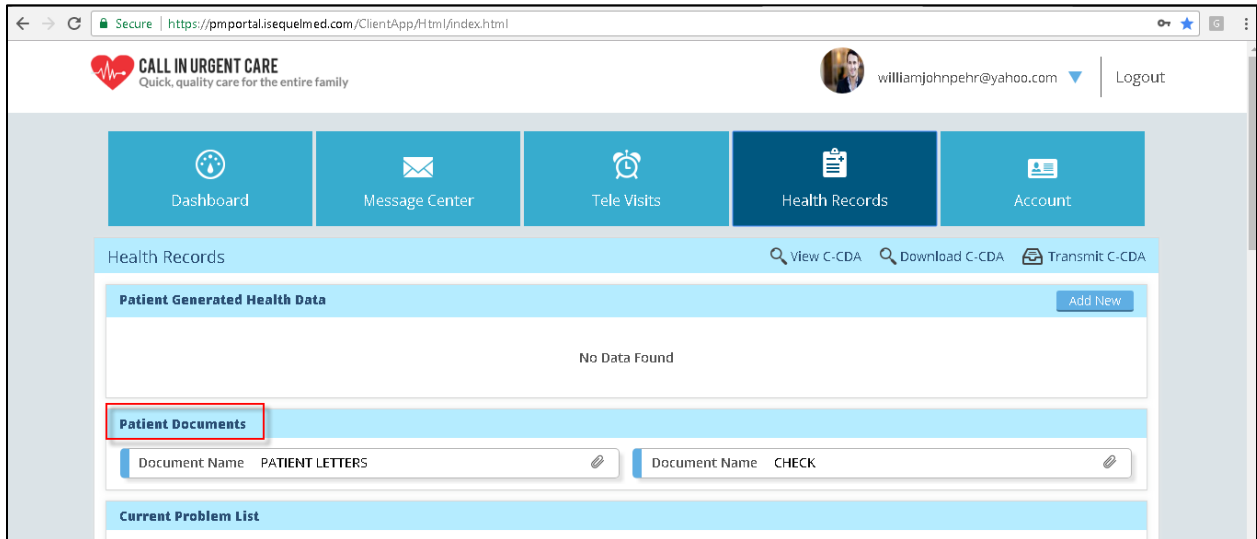
Click on Print preview to view Letter



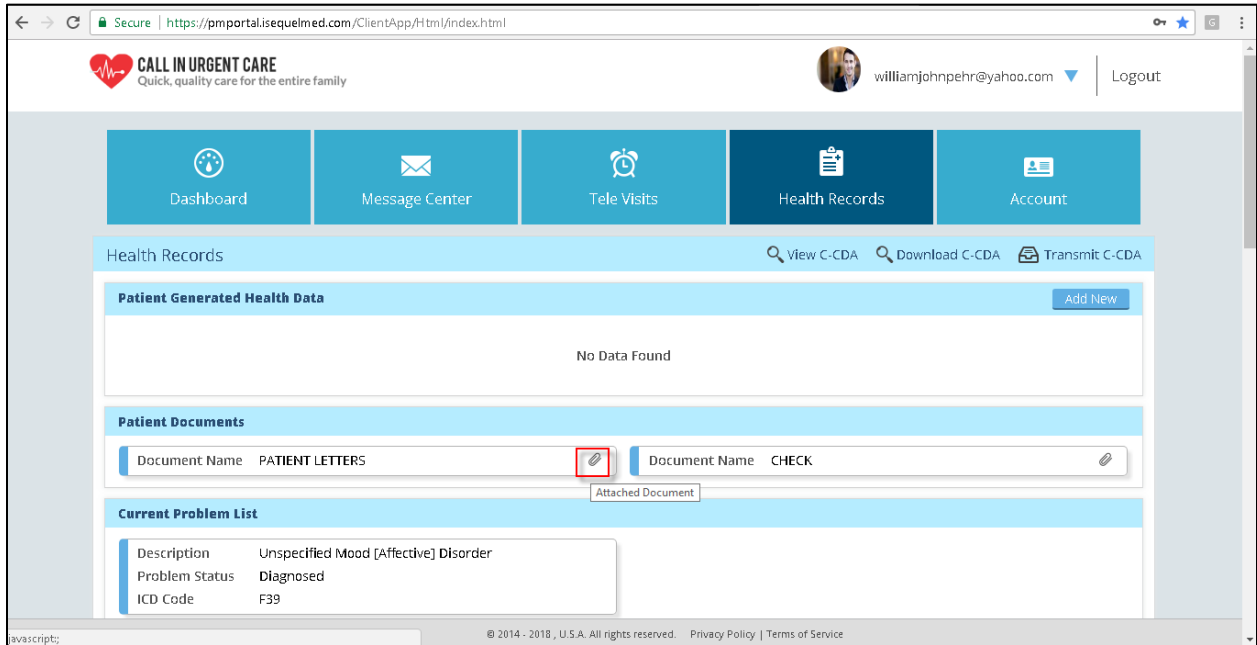
On viewing letter's print preview document will auto get saved in patient's documents Tab.



Now login Portal with Patient's Portal credentials > Go to Health Records Tab and View patient's documents in Patient Documents bucket. These documents will auto appear on Portal on taking print preview from demographics.



Now click on attachment Icon against each document in Patient Documents bucket document will auto get downloaded once clicking on attachment icon.



In case of remaining Documents types check the row from Documents Tab and click on "Share with Patient" button, document will be shared to Portal

